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FACTS

About Store Development

1989

FOOD MARKETING INSTITUTE

FACTS

About Store Development, 1989

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 210 members from over 55 nations.

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EXECUTIVE SUMMARY

Supermarkets multiplied across America once the nation returned to a peace-time economy after World War II. As the industry enters a new decade, *Facts About Store Development, 1989 (Facts),* looks back over the past four decades to illustrate how the nation's supermarket operators have continually refined and adapted their stores in response to the needs of their customers and many other forces in the marketplace.

In many respects, the supermarket trends in the 1950s were influenced by events during and immediately following World War II, especially changes in consumer lifestyles. Store construction, halted by the war, began again in earnest about 1948. The percentage of new stores remained in double digits throughout the 1950s, averaging 14.8 percent annually for the decade. New stores increased from 13,600 square feet in 1953, when FMI first began keeping track, to 22,000 square feet in 1957. The industry would not see a comparable increase in size until the 1980s.

In the 1960s, the industry was characterized by intense competition. New store size held steady at about 20,000 square feet, and construction activity slowed to about 7 percent annually. Store remodelings continued at a steady rate, affecting 5-8 percent of the stores each year.

Store construction slowed in the 1970s averaging below 5 percent annually from 1973 on. From 1973 through 1978, closings outpaced openings, a trend that would, with some exceptions, continue through the 1980s. The industry did see a sharp increase in the size of new stores in the middle of the decade.

One word may best describe store development in the 1980s: consolidation. Less than 5 percent of all stores were new each year and, in seven of the 10 years, more stores were closed than opened. The stores that were built grew larger and larger, a trend that finally eased in 1988. Grocers concentrated on remodeling their stores, particularly in the last five years of the decade.

Remodelings were a less expensive alternative to building new stores. In 1989, the typical remodeling cost $28.43 per square foot or a total capital investment of almost $481,000. By extrapolation, the typical 40,000 square foot store built in 1989 at a cost of $76.80 per square foot cost a total of $3.07 million, more than six times the cost of a typical remodeling.

Over 32 percent of remodelings added additional space to the store in 1989, typically 8,000 square feet. The most popular departments added during remodels included service seafood, service bakery/delis, and floral/plant shops. The percentage of stores remodeled in 1989 (8.4 percent) was more than double the number of stores opened (3.9 percent).

Typical new store size in 1989 (40,000 square feet) remained in line with 1988 (40,800 square feet), indicating that, after eight years of unprecedented growth, the industry is entering a period of stability in store size. Over 56 percent of the stores built in 1989 included a service bakery/deli, over 54 percent had greeting cards and 50 percent featured service seafood and floral/plant shops.

As noted above, the typical new store cost $76.80 per square foot in 1989 with $40.00 per square foot for the building itself and $36.50 per square foot for fixtures and decorations.

Facts also studied rent and leasing arrangements for supermarkets. In 1989, the average store paid $4.55 per square feet plus 0.9 percent of sales as rent for a total of $6.06 per square foot. New stores were charged $7.85 per square feet plus 1.0 percent of sales for a total of $7.99 per square foot.

KEY FACTS ABOUT STORE DEVELOPMENT FROM 1989

Percentage of Stores Newly Constructed	3.9%
Percentage of Stores Closed	3.1%
Percentage of Stores Remodeled	8.4%
Median New Store Size	40,000 Square Feet.
Median Building Cost per Square Foot for New Stores	$40.00
Median Costs for Fixtures and Decorations for New Stores	$36.50
Median Total Cost of Supermarket per Square Foot	$76.80
Median Total Capital Investment per Remodeling	$480,975
Median Cost per Square Foot per Remodeling	$28.43
Average Total Rent per Square Foot for All Stores	$6.06
Average Total Rent per Square Foot for New Stores	$7.99

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

INTRODUCTION

The decade of the 1980s saw incredible change and growth in America's retail food stores as the supermarket industry responded to the many forces in its environment. In addition to the results from the 1989 study, this year's *Facts* analyzes trends in store development in the 1980s. To help put the most recent decade into an historical context, this year's report begins with a short description of supermarket development from the end of World War II through the 1970s. This year's report features a slight change in format. The first part of the study analyzes historical trends and provides key data for 1989. The second section, beginning on page 19, features the detailed results for 1989, delineated by company size, region and store format where applicable.

THE 1950s

Background

In many respects, the supermarket trends in the 1950s were influenced by events following World War II, especially changes in consumer lifestyles. Auto registrations climbed from 26 million in 1945 to 40 million in 1950, a 55 percent increase, a trend that would continue throughout the 1950s. Homes with electricity went from 79 percent to 94 percent and the rate of population growth doubled. Housing developments mushroomed around every major city, relieving the acute housing shortage that lingered after the war and creating homes for Middle America. These homes were outfitted with the latest appliances and most had a car in the driveway. Where did their owners head to buy food? The supermarket! In 1950, supermarkets accounted for just 35 percent of food sales. By the end of the decade, that figure had doubled.

The effects of World War II influenced store development in the 1950s. Supermarket construction and remodeling ended when the nation converted to a wartime economy in 1942. In fact, during the first three years of the war, 81,000 grocery stores were closed, the majority family owned. By 1948, the aftershocks of the nation's conversion to a peacetime economy, including steep inflation and subsequent price controls, had subsided. Supermarket construction began again in earnest. In 1951, *Collier's* reported "All over the U.S., supermarkets — the most prodigious issue of a marriage between brilliant showmanship and the world's most modern distribution techniques— are springing up almost faster than they can be counted."

Store Development Trends

The percentage of new stores in the 1950s was in double digits each year, averaging 14.8 percent for the entire decade, a remarkable rate compared with recent trends. During that same time, many companies remodeled existing stores. Thus in 1950 for example, one-quarter of the nation's stores were either new or remodeled.

TABLE 1
PERCENTAGE OF STORES OPENED AND REMODELED, 1950-1959

	Opened	Remodeled
1950	16%	9%
1951	14%	9%
1952	13%	6%
1953	11%	12%
1954	14%	10%
1955	17%	7%
1956	18%	6%
1957	14%	7%
1958	16%	6%
1959	15%	6%

SOURCE: FOOD MARKETING INSTITUTE, *FOOD MARKETING INDUSTRY SPEAKS*

New Store Size

When FMI began keeping track in 1953, the typical new store measured 13,600 total square feet, a figure that increased each year to a high of 22,000 square feet in 1957, before leveling off at about 20,000 square feet. The industry would not see a comparable increase in new store size until the 1980s.

TABLE 2
MEDIAN NEW STORE SIZE, 1953-1959

1953	13,600 Square Feet
1954	15,000
1955	18,000
1956	21,200
1957	22,000
1958	20,500
1959	20,000

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

Characteristics of New Supermarkets

The spread of the automobile as a means of getting to and from the store was an important development for supermarket operators of the 1950s. They quickly realized that having a parking lot was critical, and most did according to *Facts* reports. In 1956, for example, the typical parking lot was 47,000 square feet, 2.6 times the size of the total store area.

Facts reports of the 1950s also reveal how much the industry has changed over the decades that followed. Whereas numerous service departments characterize today's stores, self-service was the norm in the 1950s. "Complete bakery departments", at that time carried "more than just commercial bread and other packaged goods." In 1955, *Facts* reported that 53 percent of stores built in that year had such a department. Almost two in three were completely self-service.

Self-service was standard in meat departments as well. *Facts 1956* reported that 96 percent of the stores opened had a meat department that was completely self service. From 1956 on, *Facts* tracked nonfood departments in new supermarkets and learned that nonfoods accounted for 4-6 percent of total sales in the late 1950s, compared with a median of about 10 percent reported for all stores in FMI's *Food Marketing Industry Speaks* studies of the late 1980s.

THE 1960s

Background

The developments of the 1960s brought several issues to bear on the supermarket industry. New products poured into the marketplace. By the middle of the decade, the industry was characterized by intense competition. In the challenge to offer something of special value, most supermarkets promoted trading stamps with greater vigor. The "discount movement" also developed in the 1960s, appealing to consumer desires for low prices. As a by-product of the decade's social unrest, the consumer movement and government began to focus on the food industry.

Store Development Trends

Store construction slowed in the 1960s: 12 percent of the stores in 1960 were new but by 1963, this had declined to 7 percent annually, remaining about that level until 1970. Remodelings continued to be important with between 5-8 percent of the stores remodeled each year.

TABLE 3
PERCENTAGE OF STORES OPENED AND REMODELED, 1960-1969

	Opened	Remodeled
1960	12%	6%
1961	11%	5%
1962	10%	6%
1963	7%	7%
1964	8%	7%
1965	9%	8%
1966	9%	8%
1967	7%	7%
1968	7%	8%
1969	7%	7%

SOURCE: FOOD MARKETING INSTITUTE, *FOOD MARKETING INDUSTRY SPEAKS*

New store size in the 1960s held steady at about 20,000 square feet. The percentage of selling area increased from 63 percent of the total store in 1960 to 71 percent by 1968, perhaps in response to the increased number of items (5,900 in 1960 to 7,800 in 1970).

TABLE 4
MEDIAN NEW STORE SIZE AND PERCENTAGE OF SELLING AREA TO TOTAL STORE AREA, 1960-1969

	Total Store Size	Percentage of Selling Area
1960	21,300 Square Feet	63%
1961	20,000	64%
1962	20,400	68%
1963	19,900	65%
1964	20,000	68%
1965	20,000	66%
1966	20,800	64%
1967	21,000	67%
1968	21,000	71%
1969	21,000	71%

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

Discount Stores

Another merchandising technique in the 1960s was the advent of huge "discount centers" which often included a supermarket and other stores, a phenomenon tracked by *Facts* at that time. In 1963, 13 percent of the new stores studied were part of a discount center. Through the rest of the decade, this figure remained at about 8 percent. These "discount stores" were not typically larger than other new supermarkets but their weekly sales were much higher. In 1968, for example, the typical new "discount store" was smaller: 20,000 square feet compared with 21,000 square feet for all new stores. The discount stores opened that year had weekly sales of $65,500 compared with $47,700 for all new stores in that year.

THE 1970s

Background

The 1970s brought myriad difficult issues for the industry. Simmering inflation in food prices boiled over in 1973 at the same time the nation was immersed in the OPEC oil crisis. FMI's, *Trends: Consumer Attitudes & the Supermarket* studies of the 1970s examined consumer concerns about high food prices and consumer activism. The good news in these reports was that consumers did not see supermarkets primarily responsible for high food prices. The brunt of the blame fell on the government and food manufacturers.

New store construction was hampered by high interest rates and competition was sharpened by a declining birth rate.

Store Development Trends

The overall pace of new construction slowed as the decade began, dropping below 5 percent annually after 1973 — the year that FMI began to track store closings.

From 1973 through 1978, closings outpaced openings, a trend that would, with some exceptions, continue through the 1980s.

The percentage of store remodelings fell slightly from the 1960s. However, throughout most of the 1970s, the level of remodelings exceeded store openings, reversing the trends of the previous two decades.

TABLE 5
PERCENTAGE OF STORES OPENED, CLOSED AND REMODELED, 1970-1979

	Opened	Closed	Remodeled
1970	9.0%	—	7.0%
1971	5.0%	—	8.0%
1972	5.6%	—	6.0%
1973	4.6%	7.3%	6.0%
1974	4.4%	6.4%	6.4%
1975	3.1%	5.3%	5.3%
1976	3.6%	5.5%	5.7%
1977	3.5%	4.7%	6.9%
1978	4.1%	4.4%	3.5%
1979	4.9%	3.7%	6.4%

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

New Store Size

New store size in the first three years of the 1970s stayed at the level of the 1960s. A major break came in 1973 when the typical new store jumped to 25,900 square feet, compared with 20,000 square feet the year before. New store size did not fall below 24,000 square feet for the rest of the decade and reached a high of 29,900 in 1978. The percentage of selling area increased, reaching 75 percent in 1979.

TABLE 6
MEDIAN NEW STORE SIZE AND PERCENTAGE OF SELLING AREA TO TOTAL STORE AREA, 1970-1979

	Total Store Size	Percentage of Selling Area
1970	20,000 Square Feet	71%
1971	20,850	70%
1972	20,000	71%
1973	25,900	72%
1974	26,035	74%
1975	24,360	70%
1976	29,056	70%
1977	27,504	71%
1978	29,907	72%
1979	27,400	75%

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

New Store Formats

Supermarkets in the 1970s began to divide into distinct formats in addition to the standard "conventional store." *Facts* studies in the early 1970s discussed "super stores," defined as a supermarket with 25,000 or more square feet of selling area. Toward the end of the decade, the "warehouse" supermarket appeared, a direct response to the need to slash operating costs and lower prices. Combination Stores — supermarkets that devote at least 25 percent of their selling space to nonfoods — also became a factor.

The 1980s

Background

At the beginning of the 1980s, inflation, high interest rates and fuel shortages were key issues facing supermarket operators. By 1982, the economy settled down, beginning a remarkable recovery that continued through the end of the decade. New issues that faced the supermarket industry included the environment and the skyrocketing cost of health care. Consumer activism and consumer confidence in the food supply were constant concerns in this period. Early on, the issue was food prices. Later in the decade the paramount issues were food safety and nutrition.

Many forces affected supermarket development in this era. Perhaps the most striking feature of the late 1980s was the industry's involvement in the merger and acquisition fray of that time. Many firms went through leveraged buyouts (LBOs), involving a massive substitution of debt for equity. The industry's debt-to-equity ratio climbed from 63.37 percent in the 1985-86 fiscal year to 81.95 percent in the 1988-89 period according to FMI's *Annual Financial Review*.

Changes in consumer lifestyles posed a huge challenge to the industry. Two-earner families with less time to shop demanded more service and convenience from their supermarkets; a continuing decline in population growth fueled competition; and, the general aging of the population resulted in a dearth of teenagers, a traditional source of labor for supermarkets.

Store Development Trends

Throughout the 1980s, the proportion of stores opened remained below 5 percent, as the industry entered a period of consolidation and slow growth.

In 1980, 1987 and 1989, slightly more stores were opened than closed, but the reverse was true in other years. High debt loads, low population growth, the high cost of land and more stringent Environmental Protection Agency (EPA) regulations on construction all contributed to the decline in new construction.

TABLE 7
PERCENTAGE OF STORES OPENED, CLOSED AND REMODELED, 1980-1989

	Opened	Closed	Remodeled
1980	4.4%	4.2%	—
1981	4.7%	5.5%	6.0%
1982	4.5%	5.8%	7.7%
1983	3.7%	4.2%	6.3%
1984	4.1%	6.9%	4.3%
1985	3.1%	4.2%	9.9%
1986	3.9%	4.6%	9.5%
1987	4.6%	3.0%	9.6%
1988	4.2%	3.1%	8.6%
1989	3.9%	3.1%	8.4%

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

STORE REMODELINGS

Costs of Remodelings

Remodelings were the order of the day, especially after 1984, as shown in Table 7. They were a less expensive alternative as companies sought to remain competitive while keeping costs down in times of high debt levels. With a median new store hovering around 40,000 square feet, at a median building cost of $76.80 per square foot, the typical store would cost $3.07 million in 1989. This compares with $480,975 for the typical remodeling at $28.43 per square foot in 1989. In real dollars, remodeling costs remained in the range of $320,000-$480,000 during the 1980s.

TABLE 8
STORE REMODELING COSTS, 1981-1989

	Total Capital Investment (Current Dollars)	Total Capital Investment (Real Dollars*)	Cost per Sq.Ft. (Current Dollars)	Cost per Sq.Ft. (Real Dollars*)
1981	$305,000	$355,533	$14.00	$15.40
1982	$308,000	$319,170	$18.34	$19.01
1983	$400,000	$401,606	$28.29	$28.40
1984	$500,000	$481,232	$21.50	$20.69
1985	$400,000	$371,747	$17.00	$15.80
1986	$400,000	$364,963	$19.16	$17.48
1987	$500,000	$440,141	$24.24	$21.34
1988	$488,000	$412,510	$20.00	$16.91
1989	$480,975	$386,635	$28.43	$22.85

*These figures are deflated by the Consumer Price Index (CPI) for all items, using the average of 1982-84 dolllars as a base

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

Timing and Characteristics of Remodelings

Generally, a store was remodeled 10 years after first opening and seven years after the last major remodeling. Over 32 percent of the stores remodeled in 1989 added more space, typically about 8,000 square feet. Often, new specialty departments were included, such as service bakery/delis, service seafood and floral/plant shops.

TABLE 9
PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN REMODELINGS IN 1989

Service Seafood	27.3%	Scratch and/or Bake-off Bakery	13.2%
Service Bakery/Deli	26.4%	Pharmacy	11.7%
Floral/Plant Shop	23.9%	Greeting Cards	5.7%
Expanded GM/HBC Sections	16.6%	Photo Centers	5.1%
Prepared Foods	15.3%	Wine	4.1%

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

TRENDS IN NEW STORE CONSTRUCTION

New Store Size

After ending the 1970s at 27,400 square feet, the typical new store crossed the 30,000 square feet mark in 1980 and escalated by leaps and bounds through 1987, an eight-year growth spurt, unprecedented in the history of the industry. This trend ended in 1988 when the median new store size was 40,800 square feet. The 1989 result of 40,000 square feet was similar. Although it is still too early to tell, the data indicate that store size has stablized once again.

One factor behind the decline in 1988 and 1989 is that one survey participant built more than 100 new stores in each of those years averaging less than 30,000 square feet. However, when the number is calculated without these stores, it is still lower than previous years. For example, the median in 1989 would have been 42,000 square feet if these stores were not included.

TABLE 10
MEDIAN TOTAL SIZE OF NEW STORES, 1980-1989

1980	33,000 Square Feet	1985	40,000
1981	34,400	1986	43,830
1982	36,400	1987	46,892
1983	38,000	1988	40,800
1984	39,800	1989	40,000

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

It is important to consider the range of responses when looking at new store size. In 1989, nearly 42 percent of the stores in the sample were under 30,000 square feet, which compares to 38 percent in 1988. Meanwhile, in 1988 and 1989, only a quarter of the stores were over 50,000 square feet compared with 47 percent in 1987.

The selling area in 1989's typical new store was 27,815 square feet, or about 70 percent of the total store area.

What type of stores were being built? In 1989, nearly 40 percent were classified as conventionals and 40.5 percent as superstores. Only 12 percent were combination stores, and less than 5 percent were warehouses.

TABLE 11
NEW STORES IN 1989

Percentage in the Following Categories

Conventional Stores	39.5%	Under 30,000 Square Feet	41.6%
Super Stores	40.5%	30,000 to 39,999	7.8%
Combination Stores	11.9%	40,000 to 49,999	26.3%
Warehouse Stores	4.6%	Over 50,000	24.3%
Other Formats	3.5%		

TABLE 12
MEDIAN TOTAL STORE SIZE BY FORMAT IN 1989

Conventional Stores	25,000 Square Feet
Super Stores	43,200
Combination Stores	58,430
Warehouse Stores	13,000

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

Characteristics of New Supermarkets

In 1989, the most popular departments and services in new stores were service bakery/delis, clearly a response to consumer demands for convenience and fresh and quality foods. FMI's *Trends: Consumer Attitudes and the Supermarket, 1990* reports that 72 percent of shoppers surveyed said that fresh sections, such as deli or bakery, were very or somewhat important in their choice of a store.

Over half the new stores built in 1989 included service seafood, as 63 percent of shoppers surveyed in *Trends* said a fresh seafood section was very or somewhat important as they selected their store. More than four in 10 new stores featured prepared foods. *Trends* also found that 29 percent of shoppers frequently took advantage of deli of carryout items from a supermarket; 40 percent did so occasionally. Table 13 shows the percentage of new stores including various specialty departments in 1989. Table 14 uses all-store data from *The Food Marketing Industry Speaks* to show how stores have changed in 10 years.

TABLE 13
DEPARTMENTS AND SERVICES IN NEW STORES, 1989

Service Bakery/Deli	56.1%	Scratch and/or Bake-off Bakery	38.2%
Greeting Cards	54.3%	Photo Centers	37.3%
Service Seafood	50.3%	Wine	32.4%
Floral/Plant shop	50.0%	Pharmacy	30.6%
Prepared Foods	41.0%		

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

TABLE 14
PERCENTAGE OF ALL SUPERMARKETS WITH THE FOLLOWING SPECIALTY AND SERVICE DEPARTMENTS, 1980 AND 1989

	1980	1989
Deli With Carry Out	37.3%	72.4%
Scratch and/or Bake-off Bakery	27.7%	62.1%
Floral/Plant Shop	19.2%	50.6%
Fresh Seafood	19.1%	42.5%
Service Meat	8.8%	26.3%
Catering	5.1%	11.3%
Pharmacy	4.6%	23.7%

SOURCE: FOOD MARKETING INSTITUTE, *FOOD MARKETING INDUSTRY SPEAKS*

New Store Costs

Respondents were asked to provide the cost per square foot for the actual building, for fixtures and decorations and for building the whole store. Median building costs in 1989 were $40.00 per square foot, median costs for fixtures and decorations were $36.50 per square foot and median total building costs were $76.80 per square foot Table 15 provides new store cost data for the past 10 years.

TABLE 15
NEW STORE COSTS, 1980-1989

	Median Total Cost per Square Foot		Median Cost for Fixtures and Decorations per Square Foot		Median Building Cost per Square Foot	
	(Current)	(Real*)	(Current)	(Real*)	(Current)	(Real*)
1980	$51.72	$62.77	$20.76	$25.19	$30.00	$36.41
1981	$54.09	$59.50	$21.03	$23.14	$33.06	$36.37
1982	$55.69	$57.71	$23.98	$24.85	$29.16	$30.22
1983	$57.69	$57.82	$23.98	$24.85	$29.50	$39.62
1984	$56.00	$53.90	$27.10	$26.08	$28.16	$27.10
1985	$60.40	$56.13	$29.00	$26.95	$30.70	$28.53
1986	$62.72	$57.23	$30.00	$27.37	$30.00	$30.11
1987	$75.66	$66.60	$35.00	$30.81	$36.04	$31.73
1988	$90.00	$76.08	$39.45	$33.35	$40.00	$33.81
1989	$76.80	$61.75	$36.50	$29.34	$40.00	$32.15

*Real dollars are deflated by the Consumer Price Index (CPI) for all items, using the average of 1982-84 dollars as a base

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

RENT AND LEASING ARRANGEMENTS FOR SUPERMARKETS

Respondents were asked to give their average minimum rent per square foot and their average overages. Overages are the percentage of the store's annual sales paid to the landlord in addition to the normal rent. In 1989, the minimum rent for existing stores averaged $4.55 per square foot with 0.9 percent of sales charged as overages. With overages, the average total rent came to $6.06 per square foot. For new stores, the average minimum rent was $7.85 per square foot plus overages of 1.0 percent of sales. Detailed information on actual leasing arrangements store-by-store can be found in Tables 38 and 39 in the next section of this report.

TABLE 16
MEAN RENT FOR EXISTING SUPERMARKETS, 1981-1989

	Minimum Rent per Square Foot	Overages as a Percentage of Sales	Expected Total Rent per Sqare Foot
1981	$2.86	0.8%	$2.97
1982	$2.91	0.9%	$4.01
1983	$3.30	0.9%	$4.45
1984	$3.31	0.9%	$4.16
1985	$3.50	0.7%	$4.34
1986	$4.17	0.8%	$5.04
1987	$4.05	0.9%	$6.00
1988	$4.14	1.0%	$4.79
1989	$4.55	0.9%	$6.06

TABLE 17
MEAN RENT FOR NEW SUPERMARKETS, 1981-1989

	Minimum Rent per Square Foot	Overages as a Percentage of Sales	Expected Total Rent per Sqare Foot
1981	$5.05	0.7%	$5.80
1982	$5.45	0.8%	$6.03
1983	$5.32	1.0%	$6.09
1984	$5.73	0.8%	$5.90
1985	$5.86	0.8%	$6.20
1986	$6.75	0.9%	$7.13
1987	$6.48	0.7%	$6.97
1988	$6.68	1.0%	$7.02
1989	$7.85	1.0%	$7.99

SOURCE: FOOD MARKETING INSTITUTE, *FACTS ABOUT STORE DEVELOPMENT*

DETAILED RESULTS FROM FACTS ABOUT STORE DEVELOPMENT, 1989

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39	Ownership/Lease Arrangement for New Stores.	45

TABLE 18-1

PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	176	65	36	20	12	10	9	16	8
1 STORE OPERATORS	44.3%	92.3%	47.2%	5.0%	-	-	-	-	-
2 - 10 STORE COMPANIES	23.9	7.7	52.8	75.0	25.0	-	-	-	-
11 - 49 STORE COMPANIES	13.1	-	-	20.0	58.3	80.0	44.4	-	-
50 + STORE COMPANIES	18.8	-	-	-	16.7	20.0	55.6	100.0	100.0
INDEPENDENTS (1 - 10 STORES)	68.2	100.0	100.0	80.0	25.0	-	-	-	-
CHAINS (11 + STORES)	31.8	-	-	20.0	75.0	100.0	100.0	100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 18-2

PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	176	12	26	48	15	22	10	9	21	13
1 STORE OPERATORS	44.3%	58.3%	46.2%	54.2%	60.0%	36.4%	40.0%	55.6%	33.3%	-
2 - 10 STORE COMPANIES	23.9	16.7	11.5	29.2	20.0	22.7	30.0	11.1	42.9	15.4
11 - 49 STORE COMPANIES	13.1	8.3	26.9	8.3	13.3	22.7	10.0	-	9.5	7.7
50 + STORE COMPANIES	18.8	16.7	15.4	8.3	6.7	18.2	20.0	33.3	14.3	76.9
INDEPENDENTS (1 - 10 STORES)	68.2	75.0	57.7	83.3	80.0	59.1	70.0	66.7	76.2	15.4
CHAINS (11 + STORES)	31.8	25.0	42.3	16.7	20.0	40.9	30.0	33.3	23.8	84.6

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 19

TYPE OF SUPERMARKETS AND NUMBER OF YEARS SINCE LAST REMODELING

	SUPERMARKETS IN OPERATION	AVERAGE NUMBER OF YEARS SINCE LAST MAJOR REMODELING
TOTAL	100.0	7.5
CONVENTIONAL STORES	65.0	8.3
SUPER STORES	23.1	5.4
COMBINATION STORES	7.8	6.8
WAREHOUSE STORES	2.7	5.4
OTHER	1.4	3.7

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 20

PERCENTAGE OF STORE ACTIVITY IN 1989 BY TYPE OF STORE

	NEW	CLOSED	ACQUIRED
TOTAL	370 100.0	207 100.0	251 100.0
CONVENTIONAL STORES	39.5%	72.9%	72.5%
SUPER STORES	40.5	20.8	8.0
COMBINATION STORES	11.9	1.4	16.7
WAREHOUSE STORES	4.6	3.9	2.0
OTHER	3.5	1.0	.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 21

MEDIAN NUMBER OF YEARS FROM FIRST OPENING TO PRESENT REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10.0	6.5	12.0	72
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	10.0	2.0	17.0	12
10 - 30 MILLION	12.5	5.5	21.5	4
31 - 100 MILLION	8.5	3.0	10.0	10
101 - 250 MILLION	8.0	4.5	15.5	8
251 - 500 MILLION	11.0	8.0	12.0	7
501 - 999 MILLION	9.0	6.5	11.0	8
1 - 3 BILLION	12.0	8.0	15.0	15
OVER 3 BILLION	10.0	8.0	12.5	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 22

MEDIAN NUMBER OF YEARS FROM LAST MAJOR REMODELING TO PRESENT REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	7.0	5.0	10.0	62
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.5	1.0	10.0	12
10 - 30 MILLION	5.5	4.0	7.0	4
31 - 100 MILLION	5.0	3.5	7.0	8
101 - 250 MILLION	7.0	6.0	10.0	5
251 - 500 MILLION	8.0	8.0	12.0	5
501 - 999 MILLION	7.0	5.0	8.0	7
1 - 3 BILLION	8.5	5.0	10.0	14
OVER 3 BILLION	9.0	7.0	10.0	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 23

MEDIAN OF TOTAL CAPITAL INVESTMENT PER SUPERMARKET PER MAJOR REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$480975	$300000	$977000	773
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	285000	200000	650000	12
10 - 30 MILLION	372500	325000	1000000	6
31 - 100 MILLION	500000	400000	750000	19
101 - 250 MILLION	731000	365500	731000	28
251 - 500 MILLION	746250	63750	1350000	29
501 - 999 MILLION	688000	300000	688000	45
1 - 3 BILLION	300000	200681	1219495	200
OVER 3 BILLION	481100	480900	977000	434

NOTE: DATA WEIGHTED BY NUMBER OF STORES THAT UNDERWENT MAJOR REMODELING

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 24

MEDIAN OF TOTAL CAPITAL INVESTMENT PER SQUARE FOOT PER MAJOR REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	$28.43	$16.59	$44.27	68
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	21.11	13.88	67.00	7
10 - 30 MILLION	34.81	12.26	42.85	6
31 - 100 MILLION	20.00	11.75	39.00	11
101 - 250 MILLION	34.50	20.09	79.79	8
251 - 500 MILLION	36.00	20.82	48.00	7
501 - 999 MILLION	21.56	18.00	26.00	6
1 - 3 BILLION	37.48	24.83	44.55	15
OVER 3 BILLION	18.46	11.75	77.87	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 25-1

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN REMODELINGS IN 1989

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	785	12	6	19	28	29	57	200	434
PHARMACY	11.7%	-	-	-	-	10.3%	7.0%	6.0%	16.8%
SERVICE BAKERY/DELI	26.4	33.3	50.0	57.9	32.1	27.6	12.3	17.0	30.2
IN-STORE SCRATCH BAKERY	13.2	8.3	33.3	26.3	3.6	-	1.8	16.5	14.1
PREPARED FOODS	15.3	50.0	16.7	63.2	7.1	10.3	24.6	18.0	10.6
EXPANDED GM/HBC SECTIONS	16.6	16.7	-	31.6	14.3	20.7	45.6	17.0	12.0
GREETING CARDS	5.7	8.3	16.7	21.1	10.7	3.4	14.0	6.0	3.5
PHOTO CENTERS	5.1	-	-	-	-	3.4	1.8	1.5	8.1
SERVICE-SEAFOOD	27.3	8.3	16.7	52.6	17.9	20.7	19.3	17.5	33.4
FLORAL/PLANT SHOP	23.9	16.7	-	15.8	21.4	27.6	19.3	15.5	29.3
WINE	4.1	8.3	16.7	31.6	7.1	-	-	5.5	2.5

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 25-2

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN REMODELINGS IN 1989

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	785	23	36	105	10	71	60	42	279	159
PHARMACY	11.7%	8.7%	-	5.7%	40.0%	2.8%	6.7%	4.8%	19.4%	11.3%
SERVICE BAKERY/DELI	26.4	4.3	19.4	16.2	60.0	32.4	31.7	33.3	32.6	18.2
IN-STORE SCRATCH BAKERY	13.2	-	8.3	15.2	20.0	26.8	-	-	18.3	8.2
PREPARED FOODS	15.3	34.8	19.4	19.0	40.0	33.8	5.0	14.3	12.2	8.8
EXPANDED GM/HBC SECTIONS	16.6	69.6	25.0	17.1	50.0	60.6	6.7	19.0	.4	16.4
GREETING CARDS	5.7	30.4	2.8	4.8	-	25.4	6.7	-	-	6.3
PHOTO CENTERS	5.1	-	2.8	2.9	-	8.5	-	19.0	7.9	-
SERVICE-SEAFOOD	27.3	13.0	19.4	9.5	60.0	21.1	15.0	54.8	40.9	17.0
FLORAL/PLANT SHOP	23.9	26.1	22.2	8.6	40.0	16.9	8.3	-	45.9	10.1
WINE	4.1	-	-	4.8	-	23.9	6.7	-	2.2	-

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 26-1

PERCENTAGE OF STORE REMODELINGS WHICH HAVE ADDED ADDITONAL SPACE TO THE STORE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	785	23	36	105	10	71	60	42	279	159
PERCENTAGE OF STORES WHICH HAVE ADDED SPACE TO THE STORE	32.2%	8.7%	41.7%	34.3%	80.0%	57.7%	41.7%	47.6%	11.5%	46.5%

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 26-2

PERCENTAGE OF STORE REMODELINGS WHICH HAVE ADDED ADDITONAL SPACE TO THE STORE

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	785	12	6	19	28	29	57	200	434
PERCENTAGE OF STORES WHICH HAVE ADDED SPACE TO THE STORE	32.2%	58.3%	50.0%	31.6%	67.9%	48.3%	26.3%	35.5%	27.2%

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 27

MEDIAN SQUARE FEET OF SPACE ADDED TO REMODELED STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	8000	5000	12000	53
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5200	5000	8000	7
10 - 30 MILLION	14000	180	50000	3
31 - 100 MILLION	6000	4000	10000	5
101 - 250 MILLION	8000	5000	8000	5
251 - 500 MILLION	5000	3500	12138	7
501 - 999 MILLION	10000	5400	15000	7
1 - 3 BILLION	10000	8288	15000	13
OVER 3 BILLION	6246	5400	6762	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 28-1

PROFILE OF NEW STORE CONSTRUCTION --MEDIANS

		GEOGRAPHIC REGION								
	TOTAL	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	346	11	4	54	6	120	7	32	30	26
TYPICAL TOTAL SQUARE FEET	40000	50000	40000	50807	47452	29000	58013	58934	40903	13000
TYPICAL SELLING AREA[1] IN SQUARE FEET	27815	36000	28000	36500	34500	20300	40902	43379	27814	8800
TYPICAL BUILDING COST PER SQUARE FOOT	$40.00	$56.50	$48.00	$40.00	$32.50	$35.39	$33.52	$32.00	$39.06	$42.50
TYPICAL COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT	$36.50	$48.00	$45.00	$31.74	$32.50	$30.50	$25.72	$30.00	$29.11	$21.56
TYPICAL TOTAL CONSTRUCTION COST PER SQUARE FOOT	$76.80	$107.00	$93.00	$76.21	$64.97	$60.00	$59.24	$60.69	$68.17	$82.37

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 28-2

PROFILE OF NEW STORE CONSTRUCTION --MEDIANS

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUNI.* REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	346	133	128	54	24	2	150	173	18	1
TYPICAL TOTAL SQUARE FEET	40000	25000	43202	58432	13000	30500	29000	43405	37455	35000
TYPICAL SELLING AREA IN SQUARE FEET	27815	17500	32917	41291	8871	24500	20300	32917	27000	21600
TYPICAL BUILDING COST PER SQUARE FOOT	$40.00	$35.00	$42.00	$33.52	$32.00	$13.00	$40.88	$40.00	$35.00	$50.00
TYPICAL COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT	$36.50	$29.26	$39.00	$30.00	$21.56	$16.00	$36.50	$37.98	$34.95	$57.00
TYPICAL TOTAL CONSTRUCTION COST PER SQUARE FOOT	$76.80	$61.67	$86.00	$59.24	$69.00	$39.00	$82.37	$76.65	$69.95	$107.00

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 29

MEDIAN TOTAL SQUARE FEET FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	40000	27000	49890	346
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	23000	17500	25976	5
10 - 30 MILLION	51613	51613	51613	21
31 - 100 MILLION	42000	24000	53000	5
101 - 250 MILLION	8000	8000	11700	6
251 - 500 MILLION	30000	13000	40000	25
OVER 500 MILLION	40100	29000	47025	284
GEOGRAPHIC REGION				
NEW ENGLAND	50000	45000	53000	11
MIDDLE ATLANTIC	40000	32500	46280	4
EAST NORTH CENTRAL	50807	38910	51613	54
WEST NORTH CENTRAL	47452	36000	65000	6
SOUTHEAST	29000	25000	29000	120
WEST SOUTH CENTRAL	58013	24000	58432	7
MOUNTAIN	58934	40000	72400	32
PACIFIC	40903	37000	50000	30
CANADA	13000	8000	15000	26
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	25000	25000	29000	144
30,000-39,999	36000	35000	37000	27
40,000-49,999	43405	42112	47025	91
50,000 AND OVER	57000	51613	65000	84
TYPE OF STORE				
CONVENTIONAL	25000	25000	29000	133
SUPER STORE	43202	40903	47025	128
COMBINATION STORE	58432	51613	72400	54
WAREHOUSE	13000	11318	55000	24
OTHER				2
LOCATION OF STORE				
COMMUNITY/REGIONAL	29000	25000	40700	150
NEIGHBORHOOD	43405	38000	49890	173
FREE STANDING	37455	16500	53000	18
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 30

MEDIAN SQUARE FEET OF SELLING AREA FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	27815	19526	35000	345
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	18200	12000	19526	5
10 - 30 MILLION	41291	41291	41291	21
31 - 100 MILLION	26000	14500	35000	4
101 - 250 MILLION	6500	6000	9500	6
251 - 500 MILLION	22200	8800	28000	[illegible]
OVER 500 MILLION	27900	20300	34705	284
GEOGRAPHIC REGION				
NEW ENGLAND	36000	35000	37000	11
MIDDLE ATLANTIC	28000	23000	34389	4
EAST NORTH CENTRAL	36500	29500	41291	54
WEST NORTH CENTRAL	34500	29130	45000	6
SOUTHEAST	20300	17500	20300	120
WEST SOUTH CENTRAL	40902	20000	40902	7
MOUNTAIN	43379	28729	52400	32
PACIFIC	27814	27814	37000	29
CANADA	8800	6500	10000	26
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	17500	17500	20300	144
30,000-39,999	27000	25176	28000	27
40,000-49,999	32917	30000	34000	91
50,000 AND OVER	41291	39900	51000	83
TYPE OF STORE				
CONVENTIONAL	17500	17500	20300	133
SUPER STORE	32917	28000	34705	128
COMBINATION STORE	41291	41291	52400	54
WAREHOUSE	8871	8800	45000	24
OTHER				2
LOCATION OF STORE				
COMMUNITY/REGIONAL	20300	17500	28300	150
NEIGHBORHOOD	32917	27814	36920	173
FREE STANDING	27000	11650	32000	17
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 31

MEDIAN COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$36.50	$29.11	$44.00	219
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	18.57	12.12	35.00	5
10 - 30 MILLION				2
31 - 100 MILLION				3
101 - 250 MILLION	33.98	22.95	51.00	6
251 - 500 MILLION	30.50	5 TO	36.00	25
OVER 500 MILLION	39.00	29.25	44.00	178
GEOGRAPHIC REGION				
NEW ENGLAND	48.00	44.50	48.10	10
MIDDLE ATLANTIC	45.00	25.50	47.54	4
EAST NORTH CENTRAL	31.74	29.00	35.56	34
WEST NORTH CENTRAL	32.50	26.00	34.00	6
SOUTHEAST	30.50	23.97	62.12	15
WEST SOUTH CENTRAL	25.72	25.72	44.05	6
MOUNTAIN	30.00	28.78	42.00	32
PACIFIC	29.11	29.11	48.65	30
CANADA	21.56	5.10	47.30	26
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	21.56	5.10	29.26	38
30,000-39,999	36.75	31.20	48.65	27
40,000-49,999	39.00	32.00	44.00	90
50,000 AND OVER	31.00	29.00	46.00	64
TYPE OF STORE				
CONVENTIONAL	29.26	22.95	36.00	27
SUPER STORE	39.00	33.00	44.00	127
COMBINATION STORE	30.00	25.72	30.00	35
WAREHOUSE	21.56	5.10	34.00	23
OTHER				2
LOCATION OF STORE				
COMMUNITY/REGIONAL	36.25	29.00	42.41	25
NEIGHBORHOOD	37.98	29.11	44.00	172
FREE STANDING	34.95	22.13	45.00	17
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 32

MEDIAN BUILDING COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$40.00	$32.89	$44.00	176
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	30.00	29.02	35.00	5
10 - 30 MILLION				2
31 - 100 MILLION				3
101 - 250 MILLION	47.60	42.50	51.00	6
251 - 500 MILLION	40.00	35.00	44.00	13
OVER 500 MILLION	40.00	32.89	44.00	147
GEOGRAPHIC REGION				
NEW ENGLAND	56.50	48.00	60.00	10
MIDDLE ATLANTIC				3
EAST NORTH CENTRAL	41.00	38.30	47.00	34
WEST NORTH CENTRAL	32.50	29.00	36.00	6
SOUTHEAST	35.39	29.50	87.09	15
WEST SOUTH CENTRAL	33.52	33.52	41.09	6
MOUNTAIN	32.00	29.00	32.89	32
PACIFIC	39.06		40.54	30
CANADA	42.50	20.	51.00	15
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	34.00	29.02	42.50	26
30,000-39,999	40.54	32.00	45.20	27
40,000-49,999	42.00	39.06	44.00	61
50,000 AND OVER	35.39	29.00	45.00	62
TYPE OF STORE				
CONVENTIONAL	35.00	29.65	43.00	27
SUPER STORE	42.00	39.06	47.86	96
COMBINATION STORE	33.52	29.00	35.39	35
WAREHOUSE	32.00	23.10	40.00	12
OTHER				1
LOCATION OF STORE				
COMMUNITY/REGIONAL	40.88	35.00	62.50	25
NEIGHBORHOOD	39.80	32.89	44.00	129
FREE STANDING	35.00	29.65	43.00	17
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 33

MEDIAN TOTAL CONSTRUCTION COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$76.60	$61.43	$88.13	176
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	47.59	42.00	70.00	5
10 - 30 MILLION				2
31 - 100 MILLION				3
101 - 250 MILLION	89.67	61.20	98.60	6
251 - 500 MILLION	77.00	69.95	85.00	13
OVER 500 MILLION	78.00	62.38	88.25	147
GEOGRAPHIC REGION				
NEW ENGLAND	107.00	89.70	108.00	10
MIDDLE ATLANTIC				3
EAST NORTH CENTRAL	76.21	68.00	82.00	34
WEST NORTH CENTRAL	64.97	42.00	70.00	6
SOUTHEAST	60.00	59.36	149.21	15
WEST SOUTH CENTRAL	59.24	59.24	85.14	6
MOUNTAIN	60.69	59.00	74.75	32
PACIFIC	68.17	68.17	89.19	30
CANADA	82.37	42.50	98.60	15
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	61.43	42.00	82.00	26
30,000-39,999	80.00	74.75	89.19	27
40,000-49,999	85.14	68.17	86.00	61
50,000 AND OVER	68.00	59.00	94.00	62
TYPE OF STORE				
CONVENTIONAL	61.67	50.70	80.75	27
SUPER STORE	86.00	72.56	93.00	96
COMBINATION STORE	59.24	59.00	64.00	35
WAREHOUSE	69.00	45.25	78.00	12
OTHER	-			1
LOCATION OF STORE				
COMMUNITY/REGIONAL	82.37	68.00	98.00	25
NEIGHBORHOOD	76.65	61.20	86.00	129
FREE STANDING	69.95	47.62	85.00	17
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 34

MEDIAN COST FOR OPENING INVENTORY

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$650000	$450000	$825000	204
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	250000	225000	360000	5
10 - 30 MILLION				2
31 - 100 MILLION	620000	300000	750000	5
101 - 250 MILLION	68000	15300	119000	6
251 - 500 MILLION	170000	153000	370000	22
OVER 500 MILLION	680000	650000	825000	164
GEOGRAPHIC REGION				
NEW ENGLAND	650500	475000	800000	9
MIDDLE ATLANTIC	425000	344050	500000	4
EAST NORTH CENTRAL	500000	446500	650000	31
WEST NORTH CENTRAL	715000	521000	1000000	6
SOUTHEAST	402900	330000	1500000	15
WEST SOUTH CENTRAL	1174500	767000	1500000	6
MOUNTAIN	1400000	825000	1400000	21
PACIFIC	825000	750000	1050000	30
CANADA	153000	113008	170000	26
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	170000	119000	297967	38
30,000-39,999	539250	410500	715000	20
40,000-49,999	680000	650000	825000	86
50,000 AND OVER	1050000	750000	1400000	60
TYPE OF STORE				
CONVENTIONAL	246888	119000	333384	28
SUPER STORE	650000	636280	750000	116
COMBINATION STORE	1400000	1000000	1500000	33
WAREHOUSE	170000	153000	800000	21
OTHER				2
LOCATION OF STORE				
COMMUNITY/REGIONAL	487500	367500	950000	24
NEIGHBORHOOD	680000	510000	825000	160
FREE STANDING	340375	165000	686280	16
OTHER				1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 35

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN NEW STORES IN 1989

	TOTAL
TOTAL STORES	219
SERVICE BAKERY/DELI	56.1%
GREETING CARDS	54.3
SERVICE-SEAFOOD	50.3
FLORAL/PLANT SHOP	50.0
PREPARED FOODS	41.0
IN-STORE SCRATCH BAKERY	38.2
PHOTO CENTERS	37.3
WINE	32.4
PHARMACY	30.6

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1990

TABLE 36-1
MEAN RENT FOR EXISTING STORES

		GEOGRAPHIC REGION								
	TOTAL	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	323	37	32	58	13	35	25	9	42	71
MINIMUM RENT	$4.55	$6.05	$4.62	$4.18	$4.63	$5.05	$1.38	$5.92	$4.44	4.78
TOTAL	228	27	22	41	6	35	15	7	32	48
OVERAGES AS A PERCENT OF SALES	.9%	1.2%	.9%	1.0%	.5%	.8%	1.1%	.6%	1.2%	.8
TOTAL	255	13	29	46	12	33	5	9	37	71
EXPECTED TOTAL RENT	$6.06	$8.78	$5.63	$5.51	$5.43	$6.03	$19.83	$6.11	$5.78	5.37

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 36-2
MEAN RENT FOR EXISTING STORES

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUN.* REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	323	187	90	22	20	0	55	173	66	17
MINIMUM RENT	$4.55	$4.03	$5.66	$4.00	$5.11		$4.15	$5.18	$3.03	6.25
TOTAL	228	123	69	14	20		42	121	42	13
OVERAGES AS A PERCENT OF SALES	.9%	1.1%	1.0%	.8%	.3%		.7%	1.0%	.7%	1.5%
TOTAL	255	134	86	15	18		45	147	41	13
EXPECTED TOTAL RENT	$6.06	$5.81	$6.39	$6.60	$6.02		$4.80	$6.08	$6.30	$11.26

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 37-1
MEAN RENT FOR NEW STORES

		GEOGRAPHIC REGION								
	TOTAL	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	53	5	6	12	3	4	0	5	3	14
MINIMUM RENT	$7.85	$10.26	$8.65	$7.25				$7.51		$6.97
TOTAL	41	5	5	9				5		8
OVERAGES AS A PERCENT OF SALES	1.0%	1.1%	1.1%	1.0%				1.6%		.8%
TOTAL	44	5	6	7				3		12
EXPECTED TOTAL RENT	$7.99	$10.56	$8.65	$7.32				$7.51		$7.08

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 37-2
MEAN RENT FOR NEW STORES

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUN.* REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	53	16	30	1	3	0	11	34	7	0
MINIMUM RENT	$7.85	$6.32	$8.60				$6.66	$8.38	$6.11	
TOTAL	41	13	25				10	25	5	
OVERAGES AS A PERCENT OF SALES	1.0%	.9%	1.1%				.9%	1.1%	.9%	
TOTAL	44	14	26				9	29	5	
EXPECTED TOTAL RENT	$7.99	$6.48	$8.68				$6.66	$8.54	$6.30	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1989

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

Explanation

To best describe the actual leasing arrangements for stores, the table lists information for each supermarket individually. It shows size, location, and type of supermarket, along with the rent paid and services provided by the landlord. All supermarkets are classified first by region then by size. To illustrate, in New England, the first region shown, each line represents a supermarket. The first line describes a 79,000 square foot super store. The company pays $6.70/square foot for rent plus 0.50 percent of sales as overages. The averages for rent, overages, annual common-area charges, total rent and size for all stores in that region appear at the end of that region's listing.

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
U.S. STORES																
NEW ENGLAND	NEIGHBORHOOD	SUPER STORE	$6.70	0.50%	$6.70											79,000
	NEIGHBORHOOD	SUPER STORE	$10.00			X		X			X	X		X	$72,000	53,000
	NEIGHBORHOOD	SUPER STORE	$10.50	1.25%	$10.50	X					X	X		X		40,000
	NEIGHBORHOOD	SUPER STORE	$8.25	1.00%	$8.72	X					X	X		X		36,552
	NEIGHBORHOOD	SUPER STORE	$10.25	0.00%	$10.25	X					X	X		X		35,000
	NEIGHBORHOOD	SUPER STORE	$9.00	1.00%	$9.50	X					X	X		X		35,000
	NEIGHBORHOOD	SUPER STORE	$5.65			X		X			X	X		X	$60,000	35,000
	NEIGHBORHOOD	SUPER STORE	$3.14	1.00%	$3.43	X					X	X			$8,022	35,000
	NEIGHBORHOOD	SUPER STORE	$8.20	1.00%	$8.20						X			X		34,028
	NEIGHBORHOOD	SUPER STORE	$2.70	1.00%	$4.12	X					X		X	X	$23,861	31,827
	NEIGHBORHOOD	SUPER STORE	$13.14	1.50%	$13.14	X					X	X		X		30,724
	FREE STANDING	CONVENTIONAL	$6.00	1.25%							X	X				30,000
	NEIGHBORHOOD	CONVENTIONAL	$2.25						X							28,000
	NEIGHBORHOOD	CONVENTIONAL	$1.75						X			X		X		26,000
	COMM./REGIONAL	CONVENTIONAL	$5.00	1.00%							X	X				26,000
	FREE STANDING	CONVENTIONAL	$2.40													23,000
	NEIGHBORHOOD	CONVENTIONAL	$4.00	1.50%							X			X	$22,000	22,190
	NEIGHBORHOOD	CONVENTIONAL	$1.90						X							22,000
	FREE STANDING	CONVENTIONAL	$6.00	1.25%							X	X				22,000
	NEIGHBORHOOD	CONVENTIONAL	$3.45	1.50%							X			X	$12,000	20,000
	NEIGHBORHOOD	CONVENTIONAL	$2.00						X							20,000
	NEIGHBORHOOD	CONVENTIONAL	$7.60	1.60%	$7.80				X	X	X				$12,000	19,000
	FREE STANDING	CONVENTIONAL	$6.00	2.00%	$8.99											19,000
	NEIGHBORHOOD	CONVENTIONAL	$4.07	1.50%							X			X	$5,098	18,410
	NEIGHBORHOOD	CONVENTIONAL	$2.38	1.50%							X			X	$2,500	18,000
	FREE STANDING	CONVENTIONAL	$1.50						X							16,000
	COMM./REGIONAL	CONVENTIONAL	$3.00								X				$4,000	15,000
	NEIGHBORHOOD	CONVENTIONAL	$8.75								X				$20,000	15,000
	NEIGHBORHOOD	COMBINATION	$7.00		$9.25	X		X			X			X		14,400
	COMM./REGIONAL	CONVENTIONAL	$11.45	1.00%							X			X	$16,667	14,000
	NEIGHBORHOOD	CONVENTIONAL	$4.92	3.00%							X			X	$7,000	13,000
	NEIGHBORHOOD	CONVENTIONAL	$7.10								X				$8,000	12,000
	NEIGHBORHOOD	COMBINATION	$12.00	0.00%	$13.50	X	X	X				X			$5,000	12,000
	BUSINESS DIST.	CONVENTIONAL	$9.28													9,700
	BUSINESS DIST.	CONVENTIONAL	$4.60													9,200
	BUSINESS DIST.	CONVENTIONAL	$8.00													7,500
	BUSINESS DIST.	CONVENTIONAL	$3.81	1.00%												7,000
AVERAGE			$6.05	1.19%	$8.78										$18,543	24,420

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
MID-ATLANTIC	NEIGHBORHOOD	COMBINATION	$5.00		$5.25	X				X	X		X		$61,803	60,000
	COMM./REGIONAL	COMBINATION	$6.90		$7.15	X			X	X	X		X		$58,561	55,700
	COMM./REGIONAL	CONVENTIONAL		0.00%		X					X		X		$31,000	53,000
	FREE STANDING	COMBINATION	$3.07		$3.07	X				X	X				$6,757	52,222
	NEIGHBORHOOD	COMBINATION	$7.60		$7.85	X			X	X	X		X		$23,446	50,000
	COMM./REGIONAL	COMBINATION	$4.77	1.00%	$4.77	X				X	X	X	X		$41,618	48,124
	NEIGHBORHOOD	SUPER STORE	$5.53	0.05%	$5.15										$22,400	43,590
	COMM./REGIONAL	CONVENTIONAL	$6.75	1.00%						X			X			38,000
	NEIGHBORHOOD	SUPER STORE	$8.00		$8.00	X				X	X					37,000
	NEIGHBORHOOD	SUPER STORE	$2.37		$2.37		X								$3,300	35,373
	NEIGHBORHOOD	SUPER STORE	$4.15	1.25%	$6.50					X						35,000
	NEIGHBORHOOD	SUPER STORE	$10.01		$10.01				X				X		$26,000	34,952
	NEIGHBORHOOD	SUPER STORE	$2.89	1.00%	$4.82		X								$9,400	34,582
	NEIGHBORHOOD	SUPER STORE	$2.33	1.00%	$4.04				X						$7,800	34,288
	FREE STANDING	SUPER STORE	$3.75	1.00%	$5.50					X						33,000
	COMM./REGIONAL	SUPER STORE	$3.80	0.05%	$3.80	X		X		X	X		X		$29,144	32,742
	NEIGHBORHOOD	SUPER STORE	$14.14	1.50%	$14.14				X						$46,000	32,500
	NEIGHBORHOOD	SUPER STORE	$2.80		$2.80	X				X	X				$3,188	31,200
	NEIGHBORHOOD	CONVENTIONAL	$4.13	1.00%	$6.66								X		$37,000	30,487
	NEIGHBORHOOD	CONVENTIONAL	$3.12		$3.12	X				X	X	X	X		$32,239	29,500
	NEIGHBORHOOD	CONVENTIONAL	$1.66	1.00%	$3.12			X	X	X			X		$8,485	25,650
	FREE STANDING	CONVENTIONAL	$6.17		$6.17										$0	25,099
	NEIGHBORHOOD	SUPER STORE	$7.37	1.25%	$8.28					X					$0	25,025
	NEIGHBORHOOD	CONVENTIONAL	$5.06	1.00%	$6.86			X		X					$9,500	23,024
	NEIGHBORHOOD	CONVENTIONAL	$1.95	0.00%	$1.95						X				$0	23,000
	COMM./REGIONAL	CONVENTIONAL	$5.77	1.00%	$6.00						X		X			22,000
	NEIGHBORHOOD	CONVENTIONAL	$4.30	1.42%	$10.25						X		X		$20,000	20,625
	NEIGHBORHOOD	CONVENTIONAL	$1.69	1.25%	$4.17			X			X		X		$800	16,960
	NEIGHBORHOOD	CONVENTIONAL	$1.50					X			X		X			16,300
	FREE STANDING	CONVENTIONAL	$3.00	1.00%	$3.00	X					X				$3,206	15,875
	FREE STANDING	CONVENTIONAL	$3.20	1.00%	$3.60						X				$0	15,000
	COMM./REGIONAL	CONVENTIONAL	$4.50	1.25%	$4.75								X		$15,000	15,000
		CONVENTIONAL	$2.50	1.00%												8,000
AVERAGE			$4.62	0.91%	$5.63										$19,102	31,904

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- --INSTALLATION OF HEATING/AIR CONDITIONING	--MAINTENANCE OF HEATING/AIR CONDITIONING	--TAXES	--INCREASES IN TAXES	--INSURANCE	--PARKING INSTALLATION	--SPRINKLER SYSTEM	--SECURITY	--SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
						V	V	V	V	V	V	V	V	V		
E N CENTRAL	FREE STANDING	COMBINATION	$3.40		$3.25											101,000
	NEIGHBORHOOD	COMBINATION	$5.00	1.00%	$7.00	X					X	X		X	-	63,000
	NEIGHBORHOOD	WAREHOUSE	$5.54		$5.54										$2,000	60,000
	FREE STANDING	COMBINATION	$6.00	1.00%	$8.00	X					X	X		X		58,000
	NEIGHBORHOOD	SUPER STORE	$3.17	1.50%	$3.80		X				X		X	X	$18,000	52,000
	NEIGHBORHOOD	WAREHOUSE	$8.25	0.00%	$8.75	X					X	X		X		51,918
	NEIGHBORHOOD	COMBINATION	$5.00	1.00%	$7.00	X					X	X		X		49,000
	NEIGHBORHOOD	SUPER STORE	$5.38	1.00%	$5.38	X					X	X		X		45,000
	NEIGHBORHOOD	WAREHOUSE	$6.17		$6.17										$1,384	43,000
	NEIGHBORHOOD	SUPER STORE	$7.40		$8.25										$12,000	42,800
	NEIGHBORHOOD	WAREHOUSE	$3.30	1.00%	$4.30	X		X	X		X	X		X	$8,000	42,000
	FREE STANDING	COMBINATION	$6.00	1.00%	$8.00	X					X	X		X		40,000
	NEIGHBORHOOD	SUPER STORE	$4.00	1.00%	$4.00						X	X			$10,000	36,000
	NEIGHBORHOOD	SUPER STORE	$6.00	1.00%	$6.00	X					X	X		X		35,000
	NEIGHBORHOOD	WAREHOUSE	$6.88		$6.88										$1,045	34,000
	NEIGHBORHOOD	SUPER STORE	$3.00	1.00%	$3.50	X		X		X	X	X		X	$0	33,000
	NEIGHBORHOOD	CONVENTIONAL	$5.25	1.00%	$5.25	X					X	X			$9,600	31,000
	NEIGHBORHOOD	CONVENTIONAL	$6.50								X			X		30,000
	COMM./REGIONAL	CONVENTIONAL	$5.08					X	X		X			X		30,000
	NEIGHBORHOOD	CONVENTIONAL	$3.98					X	X		X			X		28,800
	FREE STANDING	CONVENTIONAL	$3.00			X					X	X				28,500
	COMM./REGIONAL	CONVENTIONAL	$4.50	1.00%	$6.60						X			X	$9,000	28,000
	NEIGHBORHOOD	CONVENTIONAL	$6.50	1.00%	$7.00						X			X	$15,000	26,400
	NEIGHBORHOOD	CONVENTIONAL	$3.54		$3.54											26,000
	FREE STANDING	CONVENTIONAL	$3.82		$3.82											25,000
	FREE STANDING	CONVENTIONAL	$3.50	0.00%	$3.68	X					X	X			$0	24,000
	FREE STANDING	SUPER STORE	$4.00	0.00%	$4.85										$15,000	23,316
	NEIGHBORHOOD	CONVENTIONAL	$7.66					X	X		X			X		23,000
	FREE STANDING	CONVENTIONAL	$5.24	1.00%	$6.00	X					X	X		X		22,000
	NEIGHBORHOOD	CONVENTIONAL	$5.58					X	X		X			X		22,000
	NEIGHBORHOOD	CONVENTIONAL	$3.57	1.00%	$3.57											21,000
	FREE STANDING	COMBINATION	$1.95													20,000
	NEIGHBORHOOD	CONVENTIONAL	$6.74	1.96%							X	X		X		20,000
	FREE STANDING	CONVENTIONAL	$3.31	0.00%	$3.31											19,000
	COMM./REGIONAL	CONVENTIONAL	$2.40	0.00%	$2.74	X				X	X			X		18,000
	FREE STANDING	CONVENTIONAL	$3.00	1.50%	$5.00	X					X	X				18,000
	FREE STANDING	CONVENTIONAL	$4.80	0.00%	$4.80											17,500
	NEIGHBORHOOD	CONVENTIONAL	$5.20					X	X		X			X		17,500
	FREE STANDING	CONVENTIONAL	$3.45	0.50%	$3.60											17,000
	COMM./REGIONAL	CONVENTIONAL	$1.70	0.00%	$1.97	X				X	X			X		15,070
	BUSINESS DIST.	CONVENTIONAL	$0.66	9.00%	$39.60	X		X	X							15,000
	COMM./REGIONAL	CONVENTIONAL	$2.50	1.25%				X				X	X	X		15,000
	FREE STANDING	CONVENTIONAL	$1.00	1.00%	$5.88	X	X				X			X		14,500
	NEIGHBORHOOD	CONVENTIONAL	$6.00	1.50%	$6.75	X		X	X	X	X	X				13,250
	FREE STANDING	CONVENTIONAL	$2.60	1.00%	$5.09											13,000
	FREE STANDING	CONVENTIONAL	$3.42	0.00%	$3.42	X					X	X				11,000
	NEIGHBORHOOD	CONVENTIONAL	$4.75	1.00%	$5.00	X		X			X			X	$1,500	10,800
	FREE STANDING	CONVENTIONAL	$0.93	0.00%	$0.93										$0	10,500
	FREE STANDING	CONVENTIONAL	$2.10	1.00%	$3.25	X					X	X				8,000
	FREE STANDING	CONVENTIONAL	$4.50								X			X		7,000
	FREE STANDING	CONVENTIONAL	$6.85					X	X		X			X		6,000
		SUPER STORE	$2.16	1.00%	$3.50	X		X	X	X	X					
		CONVENTIONAL	$1.51	1.00%	$2.55	X		X	X	X	X					
		SUPER STORE	$1.55	1.00%	$1.97	X		X	X	X	X	X				
		SUPER STORE	$1.55	1.00%	$2.17	X		X	X	X	X	X				
		CONVENTIONAL	$1.79	1.00%	$2.29	X		X	X	X	X					
		SUPER STORE	$6.18	1.00%	$6.18	X				X	X	X				
		SUPER STORE	$3.36	1.00%	$3.36	X				X	X	X				
AVERAGE			$4.18	1.02%	$5.51										$6,835	28,644

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
W N CENTRAL	NEIGHBORHOOD	WAREHOUSE	$6.50	1.25%	$8.25	X		X		X	X	X			$30,000	57,000
	FREE STANDING	SUPER STORE	$3.98	0.00%	$3.98					X					$0	53,347
	COMM./REGIONAL	SUPER STORE	$2.20	1.00%	$2.52					X			X		$6,000	40,945
	COMM./REGIONAL	SUPER STORE	$5.61		$5.61	X			X	X					$4,000	38,500
	NEIGHBORHOOD	SUPER STORE	$11.80			X			X	X	X	X	X		$19,292	35,000
	COMM./REGIONAL	SUPER STORE	$5.00		$5.00	X		X	X	X			X		$15,000	33,500
	COMM./REGIONAL	SUPER STORE	$4.70		$4.70	X				X			X		$3,000	33,500
	NEIGHBORHOOD	CONVENTIONAL	$5.50	1.00%	$6.05	X				X	X		X			27,039
	NEIGHBORHOOD	CONVENTIONAL	$3.50	0.00%	$3.95			X		X						26,000
	NEIGHBORHOOD	CONVENTIONAL	$1.56	0.00%	$1.56					X					$0	19,247
	FREE STANDING	CONVENTIONAL	$3.25		$3.50											11,000
	BUSINESS DIST.	CONVENTIONAL	$1.60		$10.00	X				X			X			8,000
	BUSINESS DIST.	CONVENTIONAL	$5.00		$10.00	X				X			X			6,000
AVERAGE			$4.63	0.54%	$5.43										$9,662	29,929
SOUTHEAST	COMM./REGIONAL	WAREHOUSE		0.00%				X		X					$66,247	75,000
	NEIGHBORHOOD	WAREHOUSE		0.00%				X		X					$41,470	75,000
	COMM./REGIONAL	WAREHOUSE		0.00%				X		X					$67,431	75,000
	COMM./REGIONAL	WAREHOUSE		0.00%				X		X					$23,866	75,000
	BUSINESS DIST.	WAREHOUSE		0.00%				X		X					$28,381	62,000
	FREE STANDING	WAREHOUSE		0.00%				X		X					$25,227	62,000
	FREE STANDING	WAREHOUSE		0.00%				X		X					$34,162	62,000
	NEIGHBORHOOD	COMBINATION	$7.10	1.25%	$7.10					X	X	X	X			49,000
	NEIGHBORHOOD	WAREHOUSE	$5.75	0.00%	$6.60	X					X	X		X		43,750
	NEIGHBORHOOD	SUPER STORE	$10.59		$10.59										$14,531	40,173
	NEIGHBORHOOD	SUPER STORE	$6.57	1.00%	$6.57										$28,011	40,060
	NEIGHBORHOOD	SUPER STORE	$6.50	1.00%	$6.50					X	X	X	X			40,000
			$4.50	1.00%		X					X	X				40,000
	COMM./REGIONAL	SUPER STORE	$6.75	1.50%	$6.75	X					X	X		X		38,036
	NEIGHBORHOOD	SUPER STORE	$6.35	1.00%	$6.78										$8,906	36,912
	NEIGHBORHOOD	SUPER STORE	$6.12	1.00%	$6.12										,439	36,903
	NEIGHBORHOOD	SUPER STORE	$3.22	1.00%	$3.22											33,349
	NEIGHBORHOOD	SUPER STORE	$6.93		$6.93											33,349
	NEIGHBORHOOD	SUPER STORE	$8.52	1.00%	$9.93										$21,442	32,988
	NEIGHBORHOOD	SUPER STORE	$4.61	0.37%	$6.23											32,790
	NEIGHBORHOOD	SUPER STORE	$4.24	1.25%	$7.41										$4,255	31,810
	NEIGHBORHOOD	SUPER STORE	$4.35	1.25%	$5.77										$9,910	31,748
	NEIGHBORHOOD	SUPER STORE	$5.19	1.00%	$7.18										$6,339	31,689
	NEIGHBORHOOD	SUPER STORE	$2.54	1.25%	$9.87										$3,150	31,595
	NEIGHBORHOOD	SUPER STORE	$11.16	1.25%	$11.39										$10,315	30,750
	NEICHBORHOOD	SUPER STORE	$4.70	1.30%	$4.75	X					X	X		X	$3,027	30,269
	COMM./REGIONAL	CONVENTIONAL	$5.60	0.50%	$5.75					X	X			X		29,900
	NEIGHBORHOOD	CONVENTIONAL	$6.25	1.00%	$6.75	X					X	X			$14,000	29,000
	NEIGHBORHOOD	CONVENTIONAL	$2.37		$2.37										$2,848	27,950
	NEIGHBORHOOD	CONVENTIONAL	$5.89	1.25%	$8.03											26,450
	NEIGHBORHOOD	CONVENTIONAL	$3.51	1.00%	$5.36										$8,568	24,528
	NEIGHBORHOOD	CONVENTIONAL	$1.97	0.00%	$2.50	X					X					22,500
	NEIGHBORHOOD	CONVENTIONAL	$2.56	1.00%	$2.65			X			X			X	$2,200	21,920
	NEIGHBORHOOD	CONVENTIONAL	$1.85		$3.50			X			X			X	$2,170	21,702
	NEIGHBORHOOD	CONVENTIONAL	$3.00		$3.00											20,750
	NEIGHBORHOOD	CONVENTIONAL	$6.13	1.25%	$8.02											20,088
	NEIGHBORHOOD	CONVENTIONAL	$2.30		$2.30										$3,920	19,602
	NEIGHBORHOOD	CONVENTIONAL	$3.75	1.00%	$3.75	X		X	X		X			X	$1,869	18,692
	FREE STANDING	CONVENTIONAL	$5.15	1.50%	$6.73										$4,200	16,500
	COMM./REGIONAL	CONVENTIONAL	$3.00	1.00%	$5.00			X	X	X	X	X				15,000
	NEIGHBORHOOD	CONVENTIONAL	$3.60		$3.60	X		X	X	X	X					10,000
			$4.00	1.00%		X					X	X				
AVERAGE			$5.05	0.79%	$6.03										$17,072	36,482

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
W S CENTRAL	FREE STANDING	SUPER STORE	$1.83													44,246
	NEIGHBORHOOD	SUPER STORE	$6.00	2.00%	$7.00		X			X		X				35,000
	FREE STANDING	CONVENTIONAL	$2.75													29,268
	FREE STANDING	CONVENTIONAL	$0.20	1.00%	$45.70											28,000
	FREE STANDING	CONVENTIONAL	$3.25	1.00%												27,190
	NEIGHBORHOOD	CONVENTIONAL	$3.61	1.00%	$3.61			X	X	X						26,000
	FREE STANDING	CONVENTIONAL	$2.07	0.50%												25,051
	FREE STANDING	CONVENTIONAL	$2.50	1.00%												24,893
	FREE STANDING	CONVENTIONAL	$3.41	1.08%												23,915
	COMM./REGIONAL	CONVENTIONAL	$5.33	2.00%	$5.33					X	X		X		$0	18,000
	FREE STANDING	CONVENTIONAL	$0.45	1.00%	$37.50											8,000
	FREE STANDING	CONVENTIONAL	$0.05	1.00%												
	COMM./REGIONAL	COMBINATION	$0.18	1.00%			X		X							
	FREE STANDING	WAREHOUSE	$0.28													
	FREE STANDING	CONVENTIONAL	$0.13				X		X							
	FREE STANDING	CONVENTIONAL	$0.40				X		X							
	FREE STANDING	COMBINATION	$0.10	1.00%			X		X							
	COMM./REGIONAL	COMBINATION	$0.15	1.00%			X		X							
	FREE STANDING	COMBINATION	$0.47				X		X							
	FREE STANDING	COMBINATION	$0.45	1.00%					X							
	NEIGHBORHOOD	CONVENTIONAL	$0.16				X		X							
	FREE STANDING	CONVENTIONAL	$0.11													
	FREE STANDING	CONVENTIONAL	$0.07													
	FREE STANDING	WAREHOUSE	$0.24				X		X							
	COMM./REGIONAL	COMBINATION	$0.35	1.00%			X		X							
AVERAGE	—		$1.38	1.10%	$19.83										$0	26,324
MOUNTAIN	NEIGHBORHOOD	WAREHOUSE	$6.70	0.00%	$6.70	X				X	X		X			52,225
	NEIGHBORHOOD	WAREHOUSE	$4.74	1.00%	$4.74					X	X		X		$20,000	50,000
			$4.00		$4.00					X	X	X	X		$40,000	48,000
	NEIGHBORHOOD	WAREHOUSE	$3.62	1.00%	$3.62		X			X	X		X		$12,000	43,000
	COMM./REGIONAL	WAREHOUSE	$2.37	1.50%	$4.04					X	X		X		$15,000	38,000
			$4.00		$4.00	X	X	X		X	X		X		$30,000	37,000
	COMM./REGIONAL	WAREHOUSE	$2.44	1.00%	$2.44		X	X		X	X		X		$10,000	28,000
	FREE STANDING	CONVENTIONAL	$10.45	0.00%	$10.45	X				X	X					22,000
	NEIGHBORHOOD	CONVENTIONAL	$15.00	0.00%	$15.00		X			X					$0	7,000
AVERAGE			$5.92	0.64%	$6.11										$18,143	36,136

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- --INSTALLATION OF HEATING, AIR CONDITIONING V	--MAINTENANCE OF HEATING/AIR CONDITIONING V	--TAXES V	--INCREASES IN TAXES V	--INSURANCE V	--PARKING INSTALLATION V	--SPRINKLER SYSTEM V	--SECURITY V	--SNOW REMOVAL V	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
PACIFIC	NEIGHBORHOOD	WAREHOUSE	$7.40	0.00%	$7.40	X					X	X		X		51,800
	NEIGHBORHOOD	WAREHOUSE	$6.50	0.00%	$7.00	X					X	X		X		51,800
	NEIGHBORHOOD	WAREHOUSE	$6.50	0.00%	$7.00	X					X	X		X		50,875
	NEIGHBORHOOD	SUPER STORE	$1.60	1.50%	$3.25						X			X	$30,000	50,000
	NEIGHBORHOOD	SUPER STORE	$10.50	1.50%	$11.00	X				X					$48,000	50,000
	NEIGHBORHOOD	SUPER STORE	$8.06	1.50%	$11.75	X						X			$33,000	42,500
	FREE STANDING	SUPER STORE	$3.00	1.25%	$6.25						X	X			$8,000	40,000
	BUSINESS DIST.	SUPER STORE	$4.25	0.00%	$4.25	X									$9,000	36,953
	BUSINESS DIST.	CONVENTIONAL	$14.52	2.00%	$16.32											35,000
	NEIGHBORHOOD	SUPER STORE	$4.61	1.50%	$10.32						X				$34,000	35,000
	NEIGHBORHOOD	SUPER STORE	$2.20	1.50%	$7.10						X				$24,000	34,700
	BUSINESS DIST.	CONVENTIONAL	$11.28	2.00%	$12.00											33,500
	NEIGHBORHOOD	SUPER STORE	$8.50	1.50%	$10.40	X									$27,000	32,000
	NEIGHBORHOOD	SUPER STORE	$3.50	1.50%	$4.50			X			X			X	$30,000	31,000
	NEIGHBORHOOD	CONVENTIONAL	$8.50	1.50%				X		X	X	X			$800,000	30,000
	COMM./REGIONAL	CONVENTIONAL	$0.35	2.00%												30,000
	NEIGHBORHOOD	SUPER STORE	$3.12	1.50%	$6.89						X				$37,000	29,188
	FREE STANDING	CONVENTIONAL	$7.00	1.50%							X	X			$0	28,000
	FREE STANDING	CONVENTIONAL	$0.43		$0.52											28,000
	COMM./REGIONAL	CONVENTIONAL	$0.43		$0.52											28,000
	FREE STANDING	WAREHOUSE	$2.05		$2.05											27,000
	NEIGHBORHOOD	CONVENTIONAL	$3.78	1.50%	$10.38	X				X					$89,000	26,450
	COMM./REGIONAL	CONVENTIONAL	$0.46		$0.55											26,000
	COMM./REGIONAL	CONVENTIONAL	$0.43		$0.52											26,000
	BUSINESS DIST.	CONVENTIONAL	$9.29	2.00%	$13.00											25,845
	BUSINESS DIST.	CONVENTIONAL	$10.32	1.75%	$12.00						X				$12,000	24,144
	COMM./REGIONAL	CONVENTIONAL	$0.46		$0.55											24,000
	NEIGHBORHOOD	CONVENTIONAL	$5.65	1.50%	$6.00			X			X	X			$42,000	23,000
	NEIGHBORHOOD	CONVENTIONAL	$3.00	1.37%	$3.00				X		X	X			$8,695	23,000
	NEIGHBORHOOD	CONVENTIONAL	$3.00	1.37%	$4.25			X	X		X	X			$18,318	23,000
	NEIGHBORHOOD	CONVENTIONAL	$3.85	0.00%							X	X		X		22,000
	NEIGHBORHOOD	CONVENTIONAL	$4.50	1.50%							X	X				20,000
	NEIGHBORHOOD	COMBINATION	$2.25	0.25%	$4.50				X		X			X	$3,900	20,000
	FREE STANDING	CONVENTIONAL	$0.20		$0.25											20,000
	BUSINESS DIST.	CONVENTIONAL	$6.60	1.30%	$10.32											19,400
	FREE STANDING	CONVENTIONAL	$3.15	1.25%	$3.95				X							19,000
	FREE STANDING	CONVENTIONAL	$0.83		$1.00											18,000
	NEIGHBORHOOD	CONVENTIONAL	$0.18	1.00%	$0.33			X	X						$10,000	15,500
	NEIGHBORHOOD	CONVENTIONAL	$3.00	0.98%	$3.40											15,000
	FREE STANDING	WAREHOUSE	$10.00		$10.00											15,000
	COMM./REGIONAL	CONVENTIONAL	$0.86		$1.00											14,000
	NEIGHBORHOOD	CONVENTIONAL				X					X					9,000
	NEIGHBORHOOD	CONVENTIONAL	$0.25	1.25%	$0.29										$0	8,200
AVERAGE			$4.44	1.22%	$5.78										$63,196	28,201

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- --INSTALLATION OF HEATING/AIR CONDITIONING	--MAINTENANCE OF HEATING/AIR CONDITIONING	--TAXES	--INCREASES IN TAXES	--INSURANCE	--PARKING INSTALLATION	--SPRINKLER SYSTEM	--SECURITY	- SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
						V	V	V	V	V	V	V	V	V		
CANADIAN STORES																
ONTARIO	NEIGHBORHOOD	WAREHOUSE	$8.18	0.00%	$8.18	X					X	X		X	$33,000	68,444
	BUSINESS DIST.	SUPER STORE	$1.47	0.00%	$1.47										$38,920	60,433
	NEIGHBORHOOD	SUPER STORE	$10.92	0.17%	$11.56										$70,543	57,742
	COMM./REGIONAL	SUPER STORE	$8.15	0.00%	$8.15										$66,359	54,752
	BUSINESS DIST.	CONVENTIONAL	$4.18	0.14%	$4.73										$23,283	43,093
	COMM./REGIONAL	SUPER STORE	$7.73	0.00%	$7.73	X					X	X		X	$93,000	41,771
	COMM./REGIONAL	SUPER STORE	$10.53	0.00%	$11.03	X					X	X		X	$126,300	40,007
	FREE STANDING	SUPER STORE	$7.17	0.00%	$7.17	X					X	X			$7,100	39,249
	NEIGHBORHOOD	SUPER STORE	$9.94		$9.94	X	X				X	X		X	$178,000	38,152
	NEIGHBORHOOD	SUPER STORE	$12.00		$12.00	X	X				X	X		X	$157,000	38,000
	COMM./REGIONAL	SUPER STORE	$5.08	0.50%	$7.31	X					X	X		X	$67,100	36,990
	COMM./REGIONAL	CONVENTIONAL	$4.39	0.33%	$5.76											36,210
	NEIGHBORHOOD	SUPER STORE	$8.00		$8.00	X	X				X	X		X	$216,900	34,542
	COMM./REGIONAL	SUPER STORE	$1.31	0.50%	$3.75	X					X	X		X	$23,600	34,385
	COMM./REGIONAL	COMBINATION	$3.96	0.00%	$3.96										$30,538	32,321
	NEIGHBORHOOD	SUPER STORE	$6.08		$6.08	X	X				X	X		X	$132,000	31,695
	NEIGHBORHOOD	SUPER STORE	$3.41	1.02%	$3.71	X	X				X	X		X	$139,000	31,380
	NEIGHBORHOOD	SUPER STORE	$0.65		$0.65	X	X				X	X		X	$92,000	31,000
	COMM./REGIONAL	CONVENTIONAL	$6.59	0.00%	$6.59	X					X	X		X	$90,000	30,821
	NEIGHBORHOOD	CONVENTIONAL	$3.97	0.16%	$4.63										$26,362	30,781
	NEIGHBORHOOD	SUPER STORE	$4.49		$4.49	X	X				X	X		X	$305,000	30,586
	COMM./REGIONAL	CONVENTIONAL	$0.53	0.00%	$0.53	X					X	X			$30,200	28,440
	COMM./REGIONAL	CONVENTIONAL	$3.87	0.30%	$5.76	X					X	X		X	$32,200	26,349
	FREE STANDING	CONVENTIONAL	$0.29	0.00%	$0.29	X					X	X			$10,000	25,972
	COMM./REGIONAL	CONVENTIONAL	$5.14	0.00%	$5.14	X					X	X		X	$110,300	24,940
	NEIGHBORHOOD	CONVENTIONAL	$3.94	1.04%	$4.86	X	X				X	X		X	$98,000	24,924
	FREE STANDING	CONVENTIONAL	$7.27	0.40%	$10.65	X					X	X			$1,000	24,259
	NEIGHBORHOOD	CONVENTIONAL	$2.23		$2.23	X	X				X	X		X	$116,000	23,440
	FREE STANDING	CONVENTIONAL	$1.83	0.00%	$1.83	X					X				$3,000	23,176
	NEIGHBORHOOD	CONVENTIONAL	$7.00	1.40%	$7.00	X				X	X	X		X	$55,000	21,102
	FREE STANDING	CONVENTIONAL	$2.94	0.30%	$5.84	X					X				$1,400	20,386
	BUSINESS DIST.	CONVENTIONAL	$10.31	0.00%	$10.31	X	X				X	X		X	$104,400	20,148
	NEIGHBORHOOD	CONVENTIONAL	$6.20	1.50%	$6.20	X					X	X		X	$15,000	20,000
	NEIGHBORHOOD	CONVENTIONAL	$1.97	1.00%	$3.05	X	X				X	X		X	$100,000	19,920
	NEIGHBORHOOD	CONVENTIONAL	$6.15	1.50%	$6.15	X					X	X		X	$15,000	18,000
	NEIGHBORHOOD	CONVENTIONAL	$9.25	1.50%	$9.25	X					X	X		X	$11,000	12,500
	NEIGHBORHOOD	CONVENTIONAL	$9.00	1.50%	$12.00	X					X	X		X	$12,000	12,000
	NEIGHBORHOOD	CONVENTIONAL	$6.00		$6.00	X	X				X	X		X	$33,100	11,300
	NEIGHBORHOOD	CONVENTIONAL	$5.80	1.50%	$5.80	X					X	X		X	$12,000	11,000
	NEIGHBORHOOD	CONVENTIONAL	$6.50	1.50%	$6.50	X					X	X		X	$10,000	10,500
	BUSINESS DIST.	CONVENTIONAL	$4.02	0.00%	$5.74	X									$3,000	10,458
	NEIGHBORHOOD	CONVENTIONAL	$7.50	1.50%	$7.50	X					X	X			$6,000	8,400
	NEIGHBORHOOD	CONVENTIONAL	$10.00		$10.00	X	X				X	X		X	$17,450	2,800
AVERAGE			$5.72	0.52%	$6.27										$64,573	28,892

TABLE 38

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
QUEBEC	COMM./REGIONAL	CONVENTIONAL	$10.00	0.40%	$12.00	X	X	X	X	X	X	X	X	X	$60,000	31,000
	NEIGHBORHOOD	CONVENTIONAL	$5.08		$5.08	X	X				X	X		X	$111,000	20,000
	NEIGHBORHOOD	CONVENTIONAL	$8.50	1.50%	$8.50	X		X	X	X	X		X	X		17,000
	NEIGHBORHOOD	CONVENTIONAL	$6.50	1.09%	$10.51	X	X				X	X		X	$142,700	11,621
AVERAGE			$7.52	0.99%	$9.02										$104,567	19,905
WEST	NEIGHBORHOOD	SUPER STORE	$10.78	1.25%	$10.78	X					X	X	X	X	$32,000	57,350
	NEIGHBORHOOD	SUPER STORE	$7.75	1.00%	$7.75	X					X	X	X	X	$15,500	38,874
	COMM./REGIONAL	SUPER STORE	$8.00	1.50%	$8.00			X	X	X	X		X	X	$70,200	37,604
	COMM./REGIONAL	SUPER STORE	$7.75	1.50%	$9.10					X	X		X	X	$57,100	35,000
	NEIGHBORHOOD	SUPER STORE	$3.26		$3.26	X	X				X	X		X	$89,230	34,328
	COMM./REGIONAL	CONVENTIONAL	$6.96		$6.96	X					X	X			$44,000	32,900
	COMM./REGIONAL	CONVENTIONAL	$6.73		$6.73	X					X	X				30,500
	COMM./REGIONAL	CONVENTIONAL	$7.83		$7.83	X					X	X			$45,000	30,300
	COMM./REGIONAL	CONVENTIONAL	$6.57		$6.57	X					X	X			$65,000	28,300
	COMM./REGIONAL	CONVENTIONAL	$5.00	1.50%	$6.30					X	X		X	X	$82,600	27,682
	COMM./REGIONAL	CONVENTIONAL	$7.50	1.50%	$11.50					X	X		X	X	$61,700	24,955
	NEIGHBORHOOD	CONVENTIONAL	$2.06	1.50%	$3.10	X					X	X			$40,000	24,000
	COMM./REGIONAL	CONVENTIONAL	$6.50		$6.50	X					X	X			$42,000	24,000
	COMM./REGIONAL	CONVENTIONAL	$3.54		$3.54	X					X	X			$49,000	23,900
	NEIGHBORHOOD	CONVENTIONAL	$2.53		$2.53	X					X	X				23,100
	NEIGHBORHOOD	SUPER STORE	$6.81	1.25%	$6.81	X					X	X	X	X	$5,000	22,816
	NEIGHBORHOOD	CONVENTIONAL	$3.50		$3.50	X					X	X			$14,000	21,000
	NEIGHBORHOOD	CONVENTIONAL	$0.71		$0.71	X					X	X				20,300
	FREE STANDING	CONVENTIONAL	$1.71		$1.71	X					X	X				19,000
	NEIGHBORHOOD	CONVENTIONAL	$4.09	1.80%	$10.30					X	X			X	$44,600	18,341
	NEIGHBORHOOD	CONVENTIONAL	$5.00													17,000
	NEIGHBORHOOD	CONVENTIONAL	$5.50		$5.50	X	X				X	X		X	$65,830	16,751
	NEIGHBORHOOD	CONVENTIONAL	$2.76	1.50%	$4.50	X					X	X			$18,000	16,500
	NEIGHBORHOOD	CONVENTIONAL	$3.90		$3.90	X	X				X	X		X	$4,445	9,422
	NEIGHBORHOOD	CONVENTIONAL	$1.25	1.07%	$5.94	X	X				X	X		X	$15,500	7,500
AVERAGE			$5.12	1.39%	$5.97										$43,035	25,657
AVERAGE FOR ALL REGIONS			$4.73	0.94%	$6.32										$36,480	29,332

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1990

TABLE 39

OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

Explanation

To best describe the actual leasing arrangements for stores, the table lists information for each supermarket individually. It shows size, location, and type of supermarket, along with the rent paid and services provided by the landlord. All supermarkets are classified first by region then by size. To illustrate, in New England, the first region shown, each line represents a supermarket. The first line describes a 62,314 square foot super store. The company pays $12.00/square foot for rent plus 1.00 percent of sales as overages. The averages for rent, overages, annual common-area charges, total rent and size for all stores in that region appear at the end of that region's listing.

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
U.S. STORES																
NEW ENGLAND	NEIGHBORHOOD	SUPER STORE	$12.00	1.00%	$12.00					X	X		X	X		62,314
	NEIGHBORHOOD	SUPER STORE	$8.00	1.00%	$8.00	X		X	X	X	X	X		X		57,000
	NEIGHBORHOOD	SUPER STORE	$9.81	1.25%	$10.31					X	X			X		53,708
	NEIGHBORHOOD	SUPER STORE	$14.50	1.50%	$15.00					X	X			X		52,704
	FREE STANDING	CONVENTIONAL	$7.00	1.00%	$7.50						X				$4,000	11,000
AVERAGE			$10.26	1.15%	$10.56										$4,000	47,345
MID-ATLANTIC	COMM./REGIONAL	SUPER STORE	$7.40	1.00%	$7.40	X					X			X		49,408
	COMM./REGIONAL	SUPER STORE	$9.25	1.50%	$9.25	X					X	X				43,000
	NEIGHBORHOOD	SUPER STORE	$11.00		$11.00	X					X	X				42,000
	NEIGHBORHOOD	SUPER STORE	$9.25	1.00%	$9.25	X					X	X				42,000
	COMM./REGIONAL	SUPER STORE	$7.50	1.00%	$7.50	X					X			X		37,370
	COMM./REGIONAL	SUPER STORE	$7.50	1.00%	$7.50	X					X			X		35,132
AVERAGE			$8.65	1.10%	$8.65											41,485
E N CENTRAL	COMM./REGIONAL	SUPER STORE	$8.00	1.00%	$8.00	X					X	X				57,000
	NEIGHBORHOOD	SUPER STORE	$6.00	1.00%	$6.50	X				X	X	X	X	X	$20,000	50,000
	COMM./REGIONAL	SUPER STORE	$7.48	1.00%												47,628
	NEIGHBORHOOD	SUPER STORE	$6.75					X	X	X	X			X		45,000
	NEIGHBORHOOD	COMBINATION	$9.00		$9.00						X			X	$20,000	45,000
	COMM./REGIONAL	SUPER STORE	$7.50	1.00%	$7.50	X					X	X				43,000
	FREE STANDING	SUPER STORE														38,910
	FREE STANDING	WAREHOUSE														38,000
	NEIGHBORHOOD	SUPER STORE	$7.25	1.00%												33,032
	NEIGHBORHOOD	SUPER STORE	$9.00		$9.00						X			X	$20,000	33,000
	NEIGHBORHOOD	CONVENTIONAL	$6.50	1.00%												28,124
	NEIGHBORHOOD	CONVENTIONAL														27,908
	COMM./REGIONAL	CONVENTIONAL	$6.71	1.00%							X			X	$8,831	25,976
	NEIGHBORHOOD	CONVENTIONAL	$5.25	1.00%	$5.25	X					X	X			$13,500	25,000
	FREE STANDING	CONVENTIONAL	$6.00	1.00%	$6.00	X					X	X			$4,000	24,000
	NEIGHBORHOOD	CONVENTIONAL														22,304
	NEIGHBORHOOD	CONVENTIONAL														21,048
	FREE STANDING	CONVENTIONAL														19,422
	FREE STANDING	CONVENTIONAL														16,496
AVERAGE			$7.12	1.00%	$7.32										$14,389	33,729
W N CENTRAL	NEIGHBORHOOD	WAREHOUSE	$7.25	1.00%	$8.75	X			X		X	X	X		$30,000	65,000
	FREE STANDING	SUPER STORE	$3.49	1.00%	$3.85						X				$0	55,000
	COMM./REGIONAL	CONVENTIONAL	$5.62	0.00%	$5.62	X						X			$8,000	23,300
AVERAGE			$5.45	0.66%	$6.07										$12,667	47,767

TABLE 39

OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
						V	V	V	V	V	V	V	V	V		
SOUTHEAST	NEIGHBORHOOD	SUPER STORE	$7.50		$7.50										$25,560	58,473
	NEIGHBORHOOD	SUPER STORE	$12.25	0.00%	$12.25											47,075
	NEIGHBORHOOD	CONVENTIONAL	$7.00	1.00%	$7.00	X				X	X				$15,000	30,000
	NEIGHBORHOOD	CONVENTIONAL	$6.25		$6.75	X				X	X				$15,000	
AVERAGE			$8.25	0.50%	$8.38										$18,520	45,183
MOUNTAIN	NEIGHBORHOOD	SUPER STORE	$6.04	0.00%	$6.04	X					X					82,334
	NEIGHBORHOOD	WAREHOUSE	$5.00	2.00%						X						55,000
	NEIGHBORHOOD	SUPER STORE	$8.75	1.50%	$8.75	X				X	X		X			52,000
	NEIGHBORHOOD	SUPER STORE	$7.75	1.50%	$7.75	X	X			X	X					43,405
	NEIGHBORHOOD	SUPER STORE	$6.25	3.00%						X						40,000
AVERAGE			$6.76	1.60%	$7.51											54,548
PACIFIC	NEIGHBORHOOD	SUPER STORE	$8.10	1.25%	$8.10	X	X			X	X		X			56,971
	NEIGHBORHOOD	SUPER STORE	$9.15	1.50%	$9.15	X	X			X	X					53,893
	FREE STANDING	SUPER STORE	$6.75	1.50%	$6.75	X	X			X	X		X			53,000
AVERAGE			$8.00	1.41%	$8.00											54,621

TABLE 39

OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
CANADIAN STORES																
WEST	NEIGHBORHOOD	SUPER STORE	$11.25	1.00%	$11.25	X			X	X	X	X			$90,200	72,160
			$11.80	0.00%	$12.39				X	X						60,000
	NEIGHBORHOOD	CONVENTIONAL	$7.20		$7.20	X			X	X						30,800
	COMM./REGIONAL	CONVENTIONAL	$5.00	1.00%	$5.00	X		X	X	X	X	X			$43,300	28,096
	COMM./REGIONAL	CONVENTIONAL	$3.47		$3.47	X			X	X					$25,000	16,000
	FREE STANDING	CONVENTIONAL	$8.69	0.00%	$8.69	X									$0	12,196
	NEIGHBORHOOD	WAREHOUSE	$6.00		$6.00			X	X			X			$0	10,050
	FREE STANDING		$6.95													6,000
	FREE STANDING		$6.95													6,000
AVERAGE			$7.48	0.50%	$7.71										$30,417	26,811
ONTARIO	NEIGHBORHOOD	SUPER STORE	$13.02	0.00%	$13.02	X			X	X		X			$36,500	40,916
	NEIGHBORHOOD	CONVENTIONAL	$12.55	0.00%	$13.52	X			X	X		X			$18,600	34,391
	NEIGHBORHOOD	SUPER STORE	$7.75		$7.75	X		X	X	X		X			$26,650	33,632
	NEIGHBORHOOD	CONVENTIONAL	$7.00	1.50%	$7.50	X			X	X		X			$9,000	11,700
	NEIGHBORHOOD	CONVENTIONAL	$8.00	1.50%	$8.00	X			X	X					$8,000	8,000
	NEIGHBORHOOD	CONVENTIONAL	$8.50	1.50%	$8.50	X			X	X					$4,000	6,500
AVERAGE			$9.47	0.90%	$9.72										$17,125	22,523
AVERAGE FOR ALL REGIONS			$7.92	1.02%	$8.33										$18,766	37,600

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NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1990

APPENDIX

Methodology

The data in *Facts* are derived from FMI's annual studies of the food distribution industry. A postcard survey was sent to all FMI members and selected nonmembers to determine the extent of store development throughout the year. Approximately 600 companies representing over 15,000 stores responded for 1989. This was followed by a larger questionnaire on store development, to which 176 companies responded, representing approximately 10,500 stores.

Unless otherwise noted, all the data in *Facts* are medians. The median figure represents the midpoint for a particular measure, with one-half the figures above it and one-half below it. In calculating the median, the individual data are weighted by number of stores responding where applicable. The median is a good indicator of "typical" performance since it is not distorted by a few unusually high or low values that may exist in a sample due to special circumstances. In analyzing the data and comparing it with individual company performance, it is important to consider the "middle range." This represents the middle 50 percent of the responses.

The sample in the annual survey varies somewhat from year to year, so direct comparability is not entirely possible. Some of the year-to-year changes in the *Facts* figures may partially reflect a change in companies responding to the survey. However, we believe that the conclusions drawn form the annual *Facts* surveys represent an accurate picture of the general trends in supermarket development.

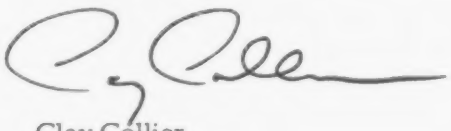
SAMPLE QUESTIONNAIRES

Dear Supermarket Operator:

As part of FMI's assessment of the industry's store development activity in 1989, we ask you to take a moment to answer the questions below. Please refold the card with the post-paid side out and return it to FMI.

We look forward to hearing from you. Thank you for your assistance.

Sincerely,



Clay Collier
Research Director

Number of Supermarkets

1. HOW MANY SUPERMARKETS WILL YOUR COMPANY HAVE IN OPERATION AS OF DECEMBER 31, 1989?
(A supermarket is a food store with annual sales of at least $2 million) _____

2. OF THOSE SUPERMARKETS IN QUESTION 1, HOW MANY WILL YOUR COMPANY OPERATE:

* That were acquired from another company in 1989? _____
* That were newly constructed in 1989? _____
* Underwent a major remodeling (a remodeling that cost at least $50,000 in 1989)? _____

3. HOW MANY SUPERMARKETS WILL YOUR COMPANY HAVE CLOSED IN 1989? _____

Name _____

Title _____

Telephone _____

THANK YOU

Please refold and staple this postcard with the FMI address facing out. Postage is prepaid

FOOD MARKETING INSTITUTE

FACTS ABOUT STORE DEVELOPMENT, 1989

This survey tracks changes and developments in new store construction, store remodelings as well as rent and leasing information for all stores. We ask that you answer as many questions as possible. All individual data are held in strictest confidence. If you have any questions, please contact Mike McCarthy in the FMI research department at 202-429-8277.

GENERAL INSTRUCTIONS

A. Please complete all sections of the survey that apply to your company. All data should be for the calendar year 1989.

B. A supermarket is defined as a retail food store with at least $2 million in annual sales.

I. GENERAL COMPANY INFORMATION

1. What will be your company's approximate annual food sales in 1989? (Please check the appropriate category)

❒ Under $10 million
❒ $10 million to $30 million
❒ $31 million to $100 million
❒ $101 million to $250 million
❒ $251 million to $500 million
❒ $501 million to $999 million
❒ $1 billion to $3 billion
❒ Over $3 billion

II. STORE REMODELINGS

2. How many stores underwent a major remodeling* in 1989?___ ___ ___ stores

3. What was the schedule for your typical supermarket that underwent a major remodeling in 1989?

a.___ ___ years from first opening to present remodeling

b.___ ___ years from last major remodeling to present remodeling

4. What was the average total capital investment per supermarket for major remodeling (for total store area)

$___ ___ ___,___ ___ ___
total investment

5. What was the average total capital investment per square foot for major remodeling?

$___ ___ ___.___ ___
per sq. ft.

* A MAJOR REMODELING IS ONE THAT COST AT LEAST $50,000

PLEASE FILL IN THE INFORMATION BELOW AND TURN THE PAGE TO COMPLETE THE REST OF THE SURVEY

NAME _____

TITLE _____

TELEPHONE _____

6. Did your remodel add any of the following departments that were not in the store before? (Please check if YES and indicate the number of stores in which each of these were included)

		Number of Stores			Number of Stores
a. Pharmacy	☐	___ ___ ___	f. Greeting cards	☐	___ ___ ___
b. Service bakery/deli	☐	___ ___ ___	g. Photo centers	☐	___ ___ ___
c. In-store scratch bakery	☐	___ ___ ___	h. Service-seafood	☐	___ ___ ___
d. Prepared foods	☐	___ ___ ___	i. Floral/Plant shop	☐	___ ___ ___
e. Expanded GM/HBC sections	☐	___ ___ ___	j. Wine	☐	___ ___ ___

Please list below any other departments added in your 1989 remodels and indicate the number of stores in which they were added

Department	Number of Stores
_____	___ ___ ___
_____	___ ___ ___
_____	___ ___ ___
_____	___ ___ ___
_____	___ ___ ___

7. How many of your remodels involved adding additional square feet to the store? ___ ___ ___remodels

8. What was the average number of square feet added to a store in your remodels? ___ ___,___ ___ ___ sq. ft.

III. GENERAL STORE INFORMATION

9. Please complete the following table for each type of supermarket your company had in operation as of December 31, 1989 (A supermarket is a food store with annual sales of at least two million dollars):

TYPE OF STORE (see definitions to the right)	Number of Supermarkets in Operation on December 31, 1989	Average Number of Years Since Supermarkets Last Major Remodel	Number of Supermarkets Newly Constructed in 1989	Number of Supermarkets Closed in 1989	Number of Supermarkets Your Company Acquired in 1989
A. Conventional Supermarket	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
B. Super Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
C. Combination Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
D. Warehouse Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
E. Other	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
F. TOTAL SUPERMARKETS	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number

STORE TYPES

Even though your company's definitions of store type may differ from the definitions that follow, we ask that you use the formats as defined here. This will help keep the store type data consistent for industry wide information.

A = Conventional Supermarket: a supermarket with total store area of 30,000 square feet or less.

B = Superstore: a supermarket with more than 30,000 square feet in total area and offering expanded selection of non-foods. Extensive service departments are also offered.

C = Combination Store: same as a superstore but the percentage of non-food is 25 percent or more of the total.

D = Warehouse Store: a supermarket that uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service.

E = Other

IV. NEW STORE DEVELOPMENT

10. How many of your new stores added any of the following services? Please check if YES and indicate the number of stores in which these were included

		Number of Stores			Number of Stores
a. Pharmacy	☐	___	f. Greeting cards	☐	___
b. Service bakery/deli	☐	___	g. Photo centers	☐	___
c. In-store scratch bakery	☐	___	h. Service-seafood	☐	___
d. Prepared foods	☐	___	i. Floral/Plant shop	☐	___
e. Expanded GM/HBC sections	☐	___	j. Wine	☐	___

11. Following is a chart requesting information on stores that were newly constructed in 1989. If your firm has constructed a number of a similar format, enter this information in one column and indicate the number of stores described per column.

	Store/Prototype #01	Store/Prototype #02	Store/Prototype #03	Store/Prototype #04
Region where store(s) is located (One region per column)				
Number of new stores	___ supermarkets	___ supermarkets	___ supermarkets	___ supermarkets
Location of Store (please circle)	A B C D	A B C D	A B C D	A B C D
Type of Store (please circle)	A B C D E	A B C D E	A B C D E	A B C D E
Total square feet per store	___,___ sq. ft.	___,___ sq. ft.	___,___ sq. ft.	___,___ sq. ft.
Square feet of selling area (customer area) per store	___,___ sq. ft.	___,___ sq. ft.	___,___ sq. ft.	___,___ sq. ft.
CONSTRUCTION COSTS per sq. ft.: A. Equipment, fixture and decoration costs	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.
B. Building (give an estimate if exact costs are unknown; do not include the cost of the land or parking lot)	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.
TOTAL CONSTRUCTION COSTS (Sum of A and B)	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.	$___,___ per sq. ft.
Average Cost of Opening Inventory	$_____	$_____	$_____	$_____

REGION

Please use the following abbreviations to describe the regions in which your supermarkets are located.

NE = North East
SE = South East
MA = Mid-Atlantic
ENC = East North Central
WNC = West North Central
WSC = West South Central
M = Mountain
P = Pacific

LOCATION OF STORE

A = **Community or Regional Shopping Center:** a planned center dominated by one or more large department or discount stores

B = **Neighborhood Shopping Center:** a planned center with more than one store but dominated by the supermarket.

C = **Free Standing:** a store located by itself or in an unplanned shopping area.

D = **City Store:** a store located in a heavily populated urban area.

V. LEASING ARRANGEMENTS

12. This chart requests leasing information on all new and existing stores. Please list one store per line. If your company leases many stores, please give a representative sample of those stores. Note the instructions for geographic region, store type and store location on the previous pages. Please write in the appropriate letter for these categories. Instructions for rent, overages and services are to the right.

FACTUAL INFORMATION	Region	Location of Supermarket(s)	Type of Supermarket(s)	RENT — Please give the rent per square foot: Minimum Rent per square foot	Rent Overages as a percent of sales	Expected Total Rent per square foot including Overages, after five years	Annual Common Area Charges	SERVICES PROVIDED BY THE LANDLORD — Please check: Installation of heating air conditioning system	Maintenance of heating air conditioning system	Taxes	Increases in taxes	Insurance	Installation of customer parking	Sprinkler system	Security	Snow Removal	TOTAL SIZE OF STORE	Circle: New or Existing
01				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
02				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
03				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
04				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
05				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
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07				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
08				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
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11				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
12				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
13				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
14				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
15				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
16				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
17				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E
18				$	%	$	$	☐	☐	☐	☐	☐	☐	☐	☐	☐	sq. ft.	N E

RENT, OVERAGES AND SERVICES

Minimum Rent: the minimum rent per square foot per year for the total store area.

Overages: the rent overages charged as a percentage of sales.

Expected total rent: give your total rent per square foot including overages. If you are describing a new store please give an estimate of the expected rent after five years of operation.

Services provided by the landlord: place a check next to each of the services which are provided by the landlord.

Thank you for your time. Your participation and cooperation are greatly appreciated. A complimentary copy of the completed report will be sent to your attention.

Michael McCarthy
Research Department
Food Marketing Institute
1750 K Street, N.W.
Washington, DC 20006

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